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MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

Italian agriculture in figures 1993

ISTITUTO NAZIONALE DI ECONOMIA AGRARIA

NORTH
1 Valle d'Aosta
2 Piemonte
3 Lombardia
4 Trentino Alto Adige
5 Veneto
6 Friuli Venezia Giulia
7 Liguria
8 Emilia Romagna

CENTRE
1 Toscana
2 Umbria
3 Marche
4 Lazio

SOUTH
1 Abruzzo
2 Molise
3 Campania
4 Puglia
5 Basilicata
6 Calabria
7 Sicilia
8 Sardegna

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MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

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MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

Italian agriculture in figures 1993

INEA

Giuseppe Colombo
President, INEA.

Encouraged by the success of this initiative in previous years, INEA, together with the Ministry for Agriculture and Forests, is pleased to present the 1993 edition of ***Italian Agriculture in Figures.***

In addition to the revised graphical presentation, new features in this edition are a chapter on Italian products with special characteristics and ample reference to the Common Agricultural Policy.

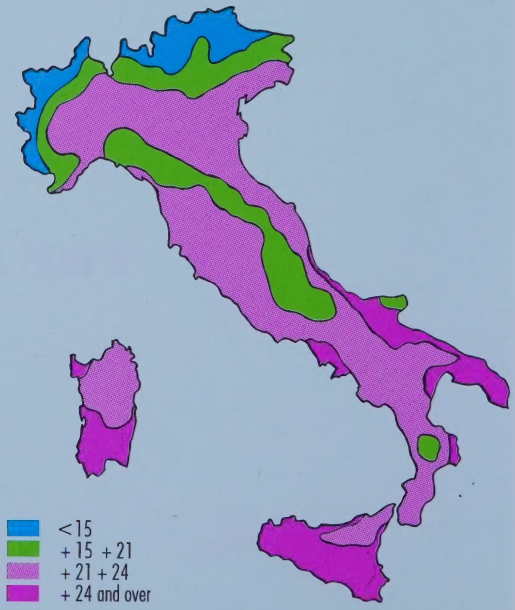
As regards the structural characteristics of agriculture,following publication of the results of the recent Census it appeared relevant to examine in depth the inter-relationships between farm and market as well as the characteristics of labour employed in agriculture.

THE ECO-SYSTEM

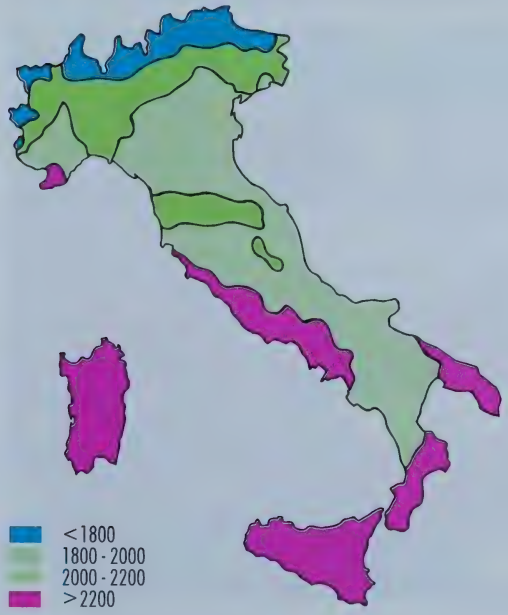
Climate

Average temperature of the coldest month (°C)

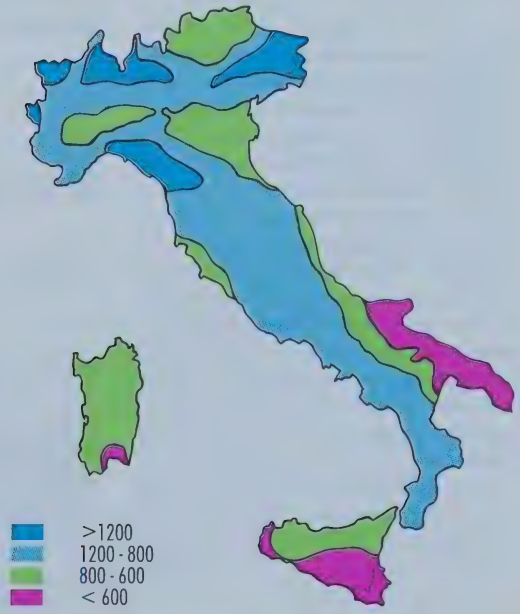
Average temperature of the warmest month (°C)



Hours of sunshine per year



Total rainfall per year (mm)



General Characteristics

An important feature of the Italian national territory is the predominance of hilly and mountainous areas. Over a total area of about 30 million hectares, plains account for only 23%; this figure falls to 18% in the South and to 9% in the Centre.Over the last decade population has increased much more slowly than in previous periods: at present the growth rate is close to zero.There are considerable differences in climatic conditions over the peninsula, from the continental climate of the North to the milder sub-continental conditions of the coastal areas and the typically Mediterranean climate of the South and Islands.

Territory and population

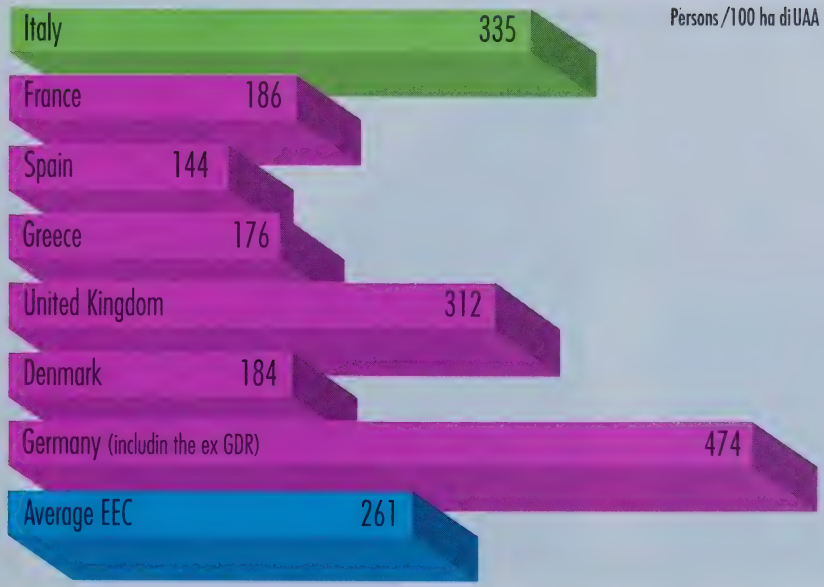
Districts	Total area Km^2	Agricultural (1) area %	Population (2) 000 units	Density no./km^2	Work force 000 units
North	119.880	46,2	25.346	211	11.392
Centre	58.368	51,8	10.913	187	4.754
South	123.053	67,4	20.619	168	8.112
Italy	301.301	55,9	56.878	189	24.258

Territory by altimetric zone (000 ha)

Zone	North	Centre	South	Italy
Mountains	5.530	1.578	3.503	10.611
Hills	2.272	3.724	6.548	12.544
Plains	4.186	535	2.255	6.976
TOTAL	11.988	5.837	12.306	30.131

(1) Including arable land, land under crops, permanent pasture, nurseries, percentage of total land area
(2) Resident population, 31 st. December 1992, provisional data

Ratios of population to agricultural area



The agricultural area and the availability of land

The process of urbanisation is progressively absorbing land in Italy. Unproductive areas, mainly residential and for infrastructure, are increasing and are estimated at about 2.8 million hectares or 9% of total national territory. The agricultural area, on the other hand, is continuously decreasing: from 1970 to 1991 utilised agricultural area (UAA) diminished by more than 2,400,000 hectares (-14%) according to Census figures.This is a phenomenon which affects all developed and newly industrialised countries. Land is thus becoming an ever-more precious resource, especially in countries which, like Italy, have a high population density and where national territory is subject to considerable variations in altitude.

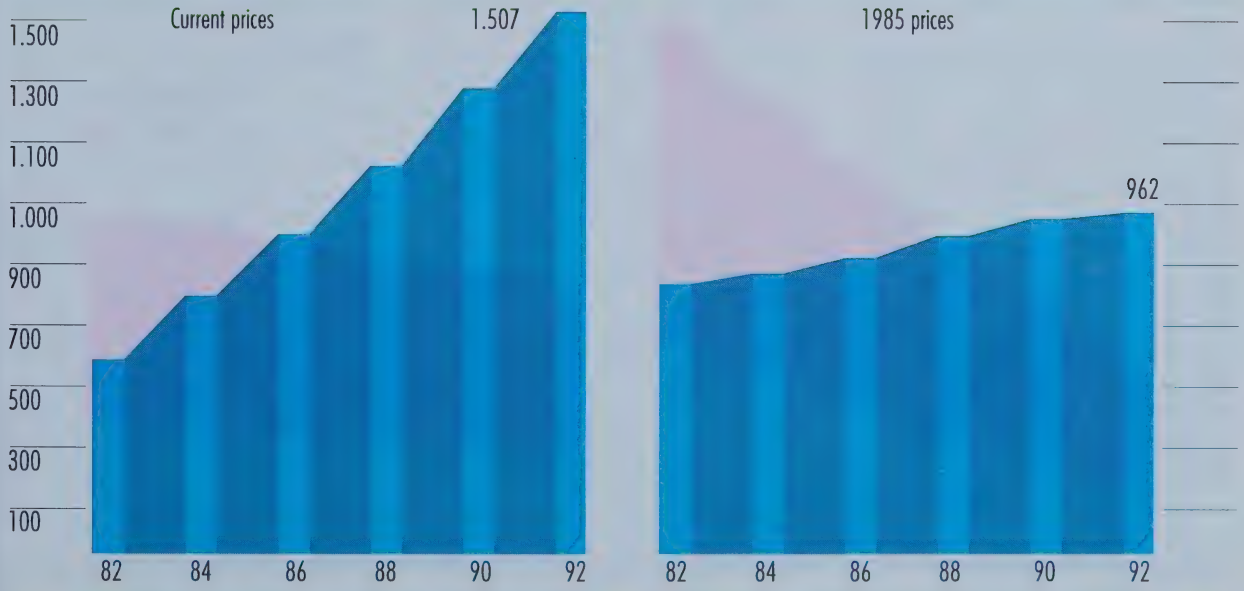
Land use in Italy and in EEC countries (%)

Utilisation	Italy	(*) Other mediterranean countries	(**) Other EEC	Total EEC
Arable land *(1)*	29,5	29,4	31,1	30,4
Permanent crops *(2)*	11,0	9,5	1,3	5,1
Vegetable gardens	0,3	-	0,2	0,2
Permanent meadows and pastures	16,2	12,4	26,5	20,9
Woodland	21,4	29,1	21,9	24,1
Inland waterways	2,4	1,2	1,7	1,7
Unproductive areas and other land *(3)*	19,2	18,4	17,2	18,0
TOTAL AREA *(000 ha)*	30.131	72.878	133.811	236.820

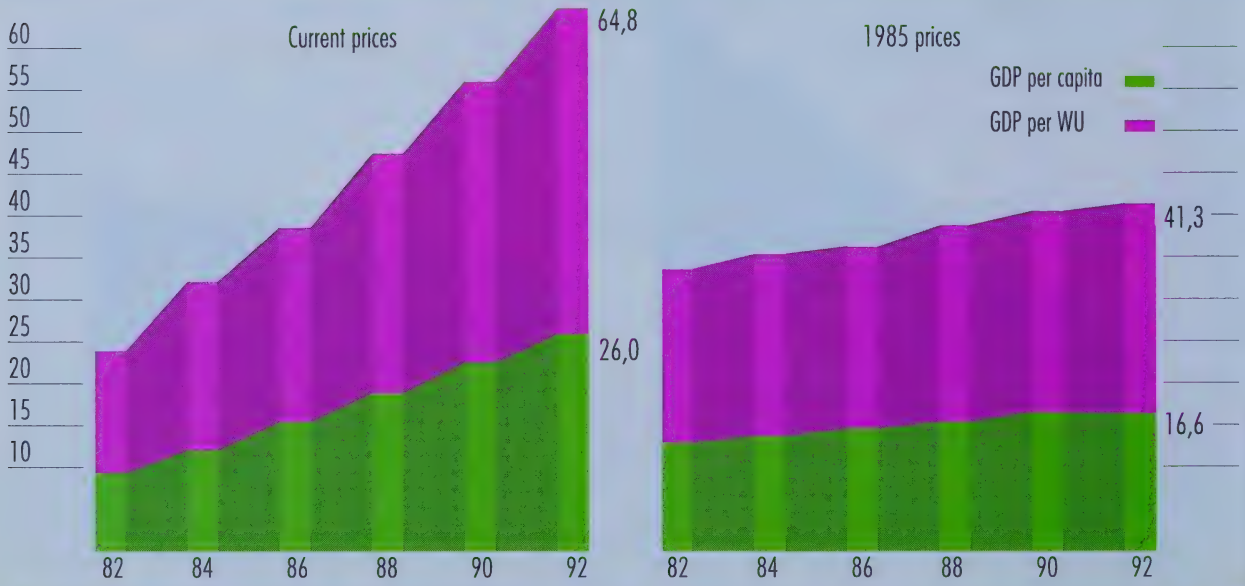
(*) Greece, Spain and Portugal
(**) France, Germany, including the ex-GDR, Benelux, Denmark, Ireland, United Kingdom
(1) Cropland including temporary forage crops and fallow land
(2) Tree crops and other permanent crops
(3) Civilian and industrial settlements, infrastructure, rocks and bare land; "other land" includes areas abandoned or uncultivated, ornamental parks and gardens, farm areas occupied by buildings, courtyards and farm roads
Source: EEC - The State of Agriculture in the European Community

Gross Domestic Product

Gross domestic product 1982-1992 *(trillion lire)*



GDP per capita and per work unit, 1981-1991 (million lire)



Community Policy

Consideration of the relationship between agriculture and the environment involves, above all, a discussion of the evolution of the environmental policy of the EEC. The latter has undergone a particularly rapid development in recent years, beginning with the addition of the Environmental Protocol to the Single European Act of 1986 which confirms the need for common action for conservation of the environment.The three preceding Programmes for Environmental Action (1973-76, 1977-81, 1982-86) already contained some guidelines for an EEC environmental policy which remain valid, but it is, however, the Single Act which lays the juridical basis for intervention in the environment, supplying a framework of reference for the various types of unilateral action. An important element in the new Treaty is the obligation to consider protection of the environment as an essential component of all the other EEC policies in an integrated approach which has become even more evident in the Fourth (1987-92) and Fifth (adopted in 1993) Programmes of Environmental Action. With specific reference to the agricultural sector, in spite of various Community provisions specific to the environment in the 1970s and 1980s, the EEC Regulation 797/85 is the first legislative measure which links agricultural policy to safeguard of the environment. As its primary objective,it had that of limiting surplus agricultural production.A whole series of measures stem from this which are linked with wider objectives of agricultural policy but which favour environmental protection through incentives for low impact methods of agricultural production, for reconversion,extensive farming and set-aside.Amongst them are to be found structural and territorial provisions such as Regulations 2052/88, 4253/88 and 2328/91 which place particular emphasis on environmental protection by encouraging the introduction of low impact cropping practises, nature conservation and long-term preservation of natural resources in agriculture.

Regulation 2092/91, later modified by Reg.2083/92, on the other hand, has a direct influence on agriculture, dealing with organic farming.Although no financial measures are foreseen, the role of organic farming in safeguarding and preserving the rural environment is recognised with the definition of a normative framework for production and marketing of organic products.

In the context of the measures accompanying the reform of the CAP, with Regulation 2078/92 direct aid to farmers has been initiated which serves to introduce or maintain

methods of agricultural production compatible with the needs of environmental protection and nature conservation. Implementation of the measures over the entire national territory is foreseen on the basis of multi-year zonal programmes which local administrations must draw up following the guidelines indicated in the Ministerial Circular of 1st February 1993,no. 4.

Amongst other recent Community initiatives must be mentioned:

- *Regulation 2080/92 which initiates a Community regime of aid to forestry in the agricultural sector. The premia and the incentives to forestry plantings have the dual objective of protecting the environment and of putting a brake on agricultural production;*
- *Regulation 1973/92 which introduces a financial measure in favour of the environment (LIFE).An allocation of 400 million ECU is foreseen for the period 1991-95 for all actions contributing to development and application of Community policy and legislation for the environment following the principles of polluter pays and of subsidiarity;*
- *Directive 43/92 concerning the preservation of natural and semi-natural habitats and of wild flora and fauna. The main objective of the Directive is that of preserving biodiversity through maintenance or restoration of habitats and of species of animal or plant.For this purpose special areas of conservation are to be identified which will constitute a European ecological network (Natura 2000).*

Protected areas

Five national parks have already been set up in Italy:

- *Gran Paradiso 70,000 ha*
- *Stelvio 134,620 ha*
- *Abruzzo 40,000 ha*
- *Circeo 8,400 ha*
- *Calabria 15,435 ha*

The establishment of the following national parks has been deliberated under the Financial Law for 1988:

- *Dolomiti Bellunesi 25,000 ha*
- *Monti Sibillini 75,000 ha*
- *Pollino 176,000 ha*
- *Parco Marino del Golfo di Orsei 220 square kmq*

The three year Plan of the Ministry for the Environment provides for the establishment of the national park of Aspromonte (99,000 ha) and for the following inter-regional parks:

- *Delta del Po (1,000 square km)*
- *Foreste Casentinesi (17,650 ha)*
- *Arcipelago Toscano (25.000 ha of land and 65 ha of sea)*

The following national parks have been established by the law no. 394/91:

- *Gran Sasso*
- *Monti della Laga*
- *Gargano*
- *Vesuvio*
- *Maiella*
- *Cilento e Vallo di Diano*
- *Gennargentu e Isola dell'Asinara*

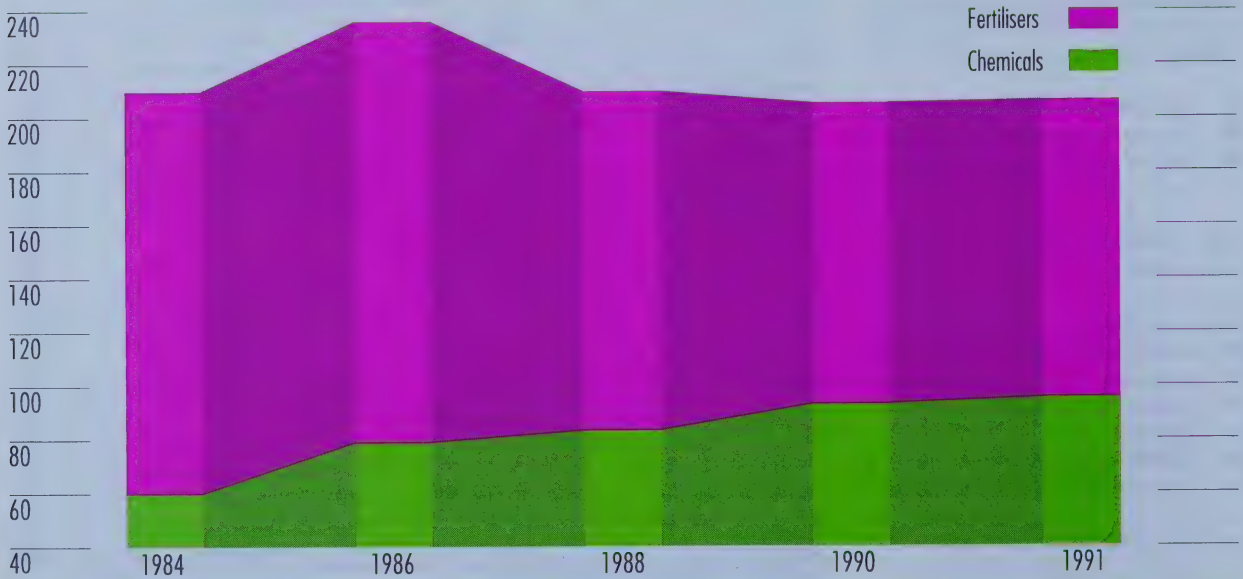
State and Regional protected areas in Italy - October 1991

Regions	Protected areas (area in ha.)		
	Regional total	Total	%
Piemonte	121.729	167.202	6,19
Valle d'Aosta	3.521	41.021	12,57
Lombardia	397.893	463.888	19,45
Bolzano (p.a.)	114.966	168.413	16,38
Trento (p.a.)	82.472	101.858	4,30
Veneto	36.750	94.343	4,30
Friuli-Venezia Giulia	43.130	45.172	5,76
Liguria	62.367	62.383	11,53
Emilia Romagna	111.289	159.712	6,96
Toscana	91.800	192.405	5,45
Umbria	-	17.957	2,13
Marche	6.000	62.594	6,46
Lazio	79.567	101.666	5,54
Abruzzo	38.738	89.297	8,15
Molise	-	5.656	1,26
Campania	220	2.198	0,16
Puglia	424	14.770	0,54
Basilicata	81.577	176.038	17,29
Calabria	3.000	134.931	7,11
Sicilia	116.648	118.354	4,18
Sardegna	-	14.147	0,59
ITALY	1.392.091	2.234.005	8,10

Source: Ministry for the Environment

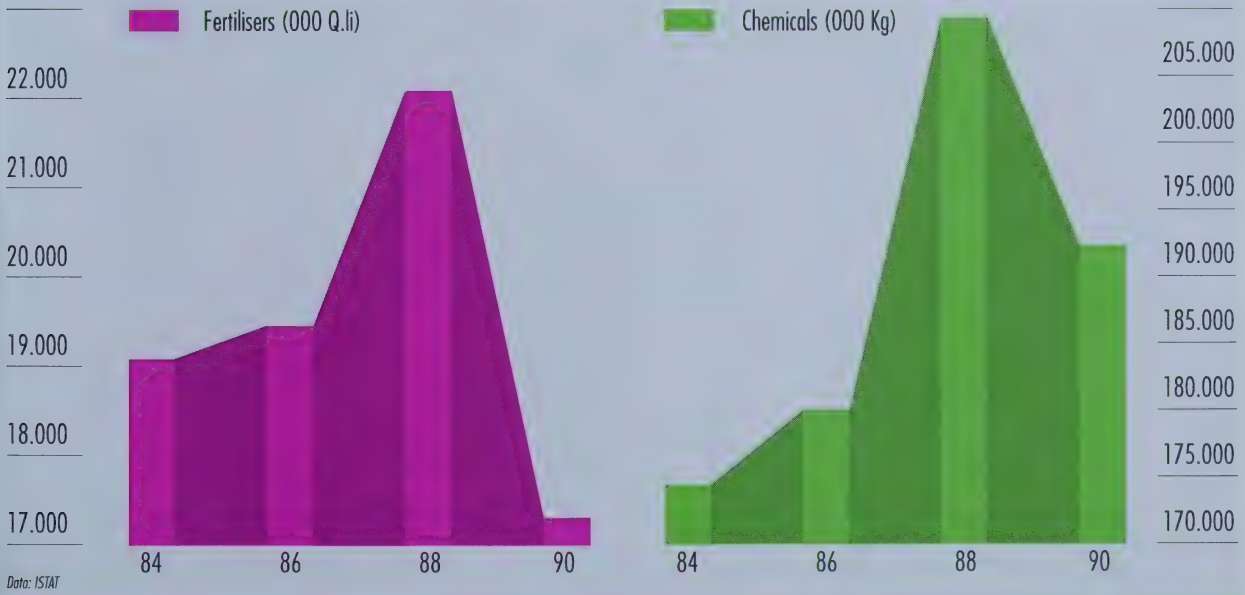
The Use of Chemicals in Agriculture

***Fertilisers and chemicals: expenditure per hectare of UAA** (000 lire)*



Data: INEA

Fertilising elements in agricultural chemicals sold to the public



Data: ISTAT

The use of fertilisers and agricultural chemicals in Italy 1990

Regions	(1) Retail sales				(2) Farm utilisation per ha di SAU			
	(3) Fertilisers	% change 1990/85	(4) Chemicals	% change 1990/85	Fertilisers	% change 1990/85	Chemicals	% change 1990/85
Valle d'Aosta	9	321,6	75	59,6	38	-	2	28,3
Piemonte	1.706	-11,2	16.270	-6,8	335	1,1	131	39,8
Lombardia	2.540	-15,0	13.904	-0,1	409	-1,0	107	69,8
Trentino-A. Adige	114	-35,2	5.215	9,9	460	11,5	340	19,9
Veneto	1.967	-23,5	22.844	23,1	297	-27,3	170	45,3
Friuli-V. Giulia	563	-22,7	3.639	9,2	352	-27,5	122	66,5
Liguria	34	-7,8	3.101	42,4	726	51,9	390	70,2
Emilia Romagna	2.265	4,5	30.943	38,9	168	-3,3	207	88,8
Toscana	917	-15,6	7.589	1,0	167	0,5	70	52,6
Umbria	447	-0,6	3.538	50,1	206	7,4	90	91,6
Marche	718	-12,0	5.976	20,9	146	-0,6	48	70,1
Lazio	896	-0,7	14.162	42,4	172	26,9	55	57,8
Abruzzo	578	24,8	5.282	17,8	267	18,0	125	38,1
Molise	176	-5,8	957	30,7	179	-9,7	116	8,2
Campania	690	-26,4	14.433	-2,2	252	9,7	157	113,2
Puglia	1.301	-17,5	15.795	-4,7	190	22,3	73	93,6
Basilicata	232	-43,1	2.339	55,7	148	6,4	98	55,3
Calabria	349	-20,2	4.514	9,0	88	-4,3	27	-9,1
Sicilia	1.190	-9,4	17.723	19,9	207	53,6	143	111,2
Sardegna	470	7,0	4.210	62,7	34	2,8	10	107,4
ITALY	17.162	-12,5	192.509	15,4	206	-10,1	93	41,4

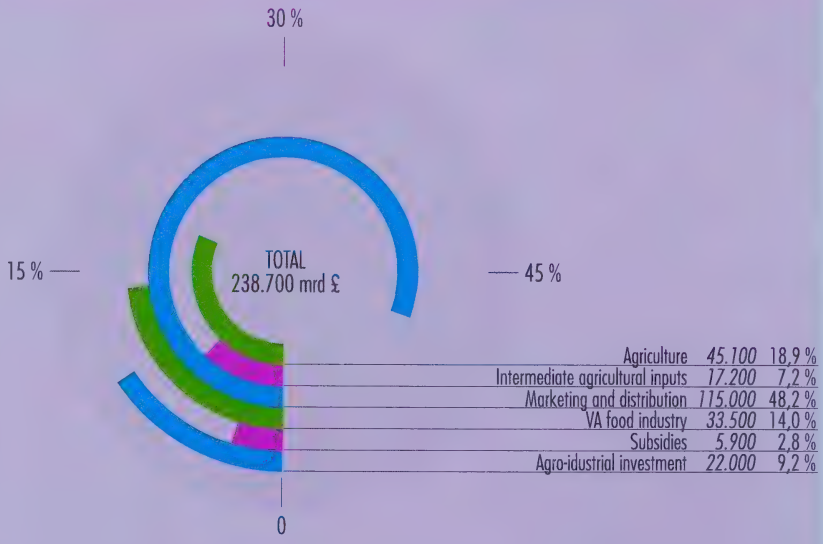
(1) ISTAT data (2) INEA data , values in 000 £/ha (3) data 000 ql. (4) data in 000 Kg

THE AGRO-INDUSTRIAL SYSTEM

Components

The agro-industrial system constitutes a set of activities where agriculture interacts with all those sectors which are linked to it: the production of inputs(fertilisers, pesticides, feed compounds, energy etc.); the food and catering industries. The whole system is connected by a dense trading and distribution network. Estimates set the value of the agro-industrial complex in 1992 at more than 240,000 billion lire, of which 45,100 attributable to value added in agriculture, 17,200 to intermediate inputs, 22,000 to agro-industrial investment, 33,500 to value added in the food industry and 115,000 to the trading and distributive sector.Services supplied by the public sector are not included in the estimates, even though they make an important contribution to the system.

Main components

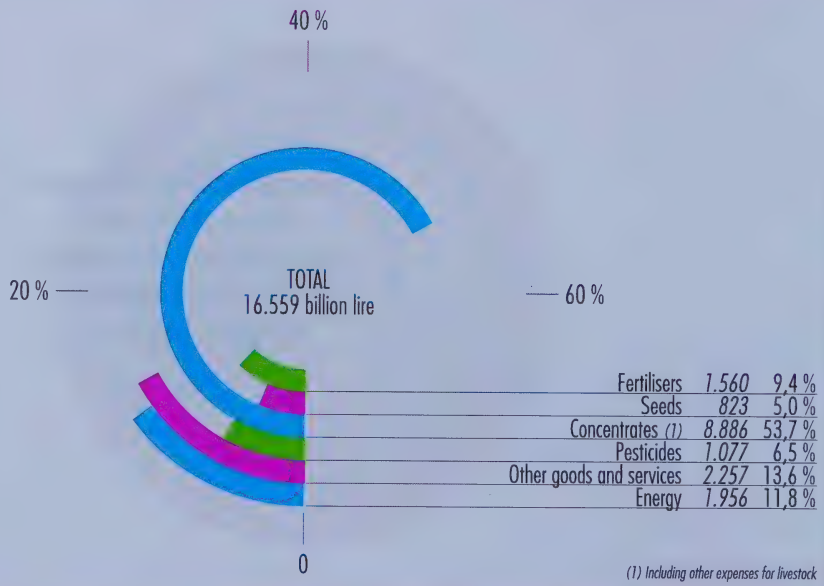


Intermediate Inputs
Investment
Agricultural Credit
Mechanisation
Employment

Intermediate Inputs

Expenditure for intermediate inputs in agriculture was more or less stationary as compared with that in 1991.This was the outcome of a reduction in quantities employed (-1.5%) and an increase in prices of almost the same magnitude (1.2%).The volume of inputs used for crop production fell, on average, by 3% the reduction in pesticides continued (-1.2%)as it has done for several years due, amongst other things, to greater awareness of problems connected with health amd with the environment. There was a considerable drop in the use of fertilisers (-4.8%); sales of seeds also fell (-1.2%), probably as a result of the application of set-aside. In the livestock sector the consumption of feed concentrates fell (-1.7%), reflecting the difficult situation in the dairy sector. The purchases of services also fell (-1.7%) after several years of increases. The only exception was that of an increase in the consumption of motor fuel which increased by 1.4%.

Main categories of intermediate inputs



(1) Including other expenses for livestock

Trends from 1980 to 1992 (*)

	Value, current prices billion lire	Value 1985 prices billion lire	% of total gross fixed investment *(1)*	% Ratio agricultural investment to *(1)* agricultural VA.
1980	7.465	13.929	7,9	36,3
1981	8.646	13.319	7,8	34.9
1982	9.229	12.289	7,6	33.0
1983	10.537	12.643	7,9	30,9
1984	11.583	12.657	7,6	32,6
1985	12.234	12.234	7,3	31,2
1986	13.103	12.410	7,2	31,2
1987	13.611	12.225	6,8	29,5
1988	16.117	13.666	7,1	34,0
1989	16.397	13.062	6,5	32,1
1990	16.180	12.040	5,8	30.6
1991	16.417	11.375	5,4	26,7
1992	17.093	11.227	5,4	26,2

(*) Including forestry and fishing
Source: INEA calculations on ISTAT data
(1) at 1985 prices

In 1992 agricultural investment decreased by about 1.3% in real terms, reflecting the fall in demand for machines and equipment and the reduction in public financing. The hesitant growth evident throughout the nineteen eighties shows signs of fading in the early years of the nineteen nineties. The share of agricultural investment in total gross fixed investment is declining, as is its magnitude in proportion to value added in agriculture.

Agricultural Credit

In 1992 the effects on agricultural credit of a decrease in public subsidies to credit and of a slowing down in the growth of agricultural production were evident. Erogation of credit for working capital was considerably reduced and the incidence of subsidised credit fell by two points as compared with 1991.
The negative effects of the general economic situation were noticeable,particularly in the second half of the year, linked with restrictive monetary and credit policy.

Erogations

Type of credit	1991		1992	
	billion lire	% credit subsidised	billion lire	%credit subsidised
Farm improvements	16.446	47,4	14.876	46,1
Working capital	1.846	53,8	1.761	44,3
TOTAL	18.292	48,1	16.637	45,9

Levels of indebtedness in agriculture

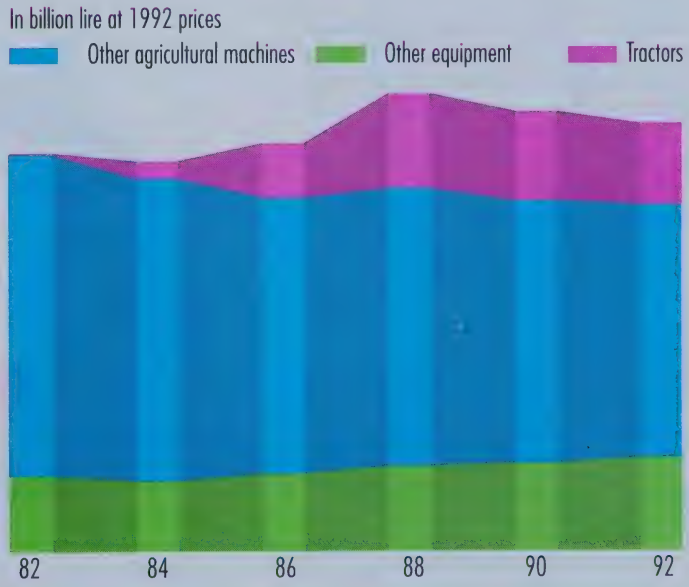
	1987	1988	1989	1990	1991	1992
Agrarian credit (billion lire)	23.435	25.466	27.153	27.653	27.862	27.111
% VFO	44,7	49,1	49,6	49,5	44,9	44,8

Source:calculations on data from Bank of Italy

Trends in investment in machines and equipment

In billion lire at current prices

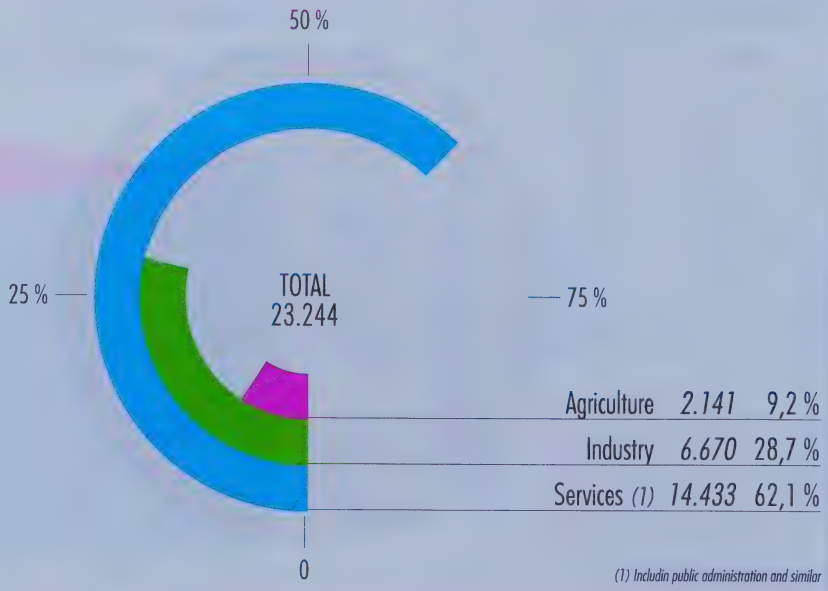
	Tractors	Other machines	Other equipment
'82	1.834	1.958	476
'83	2.026	2.063	442
'84	2.326	2.261	516
'85	2.652	2.428	583
'86	2.786	2.574	644
'87	2.979	2.598	636
'88	3.475	2.949	740
'89	3.717	3.208	817
'90	3.672	3.237	851
'91	3.863	3.341	886
'92	4.357	3.523	958



Employment

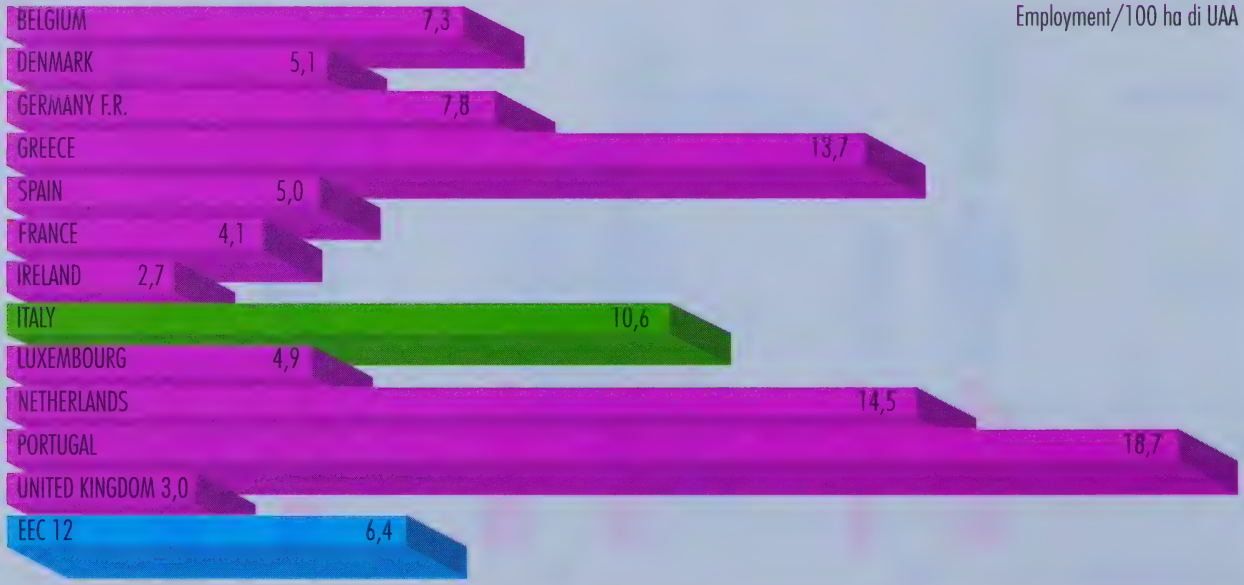
The situation as regards the level of employment deteriorated in 1992: employment in agriculture decreased considerably (-4.2% as compared with 1991) as did that in industry (-2.4%). In the service sector the growth trend apparent in recent years came to a halt. There was a very slight increase in public employment and related activities. There was a striking fall in the number of self-employed agricultural workers (-106,000, about 7%) whereas there was an increase in wage employees (11,000 or 1.5%); this latter category increased in relative importance, constituting 33.7% of total agricultural work units. The ratio between agricultural workers and the total population is continually changing: in 1970 for every agricultural work unit there were 14 inhabitants, 19 in 1980 and in 1992, 27.

***WU per sector** (000 units)*



***WU / population** (%)*

Employment in agriculture in the EEC in 1991

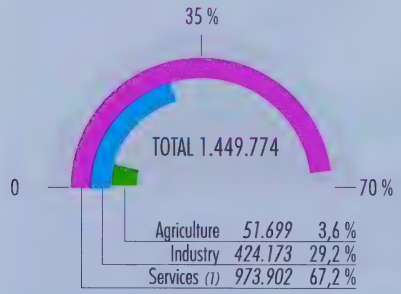


Value Added
Productivity
Production
Set-Aside
Prices and Costs
VFO and Agricultural Incomes

Value Added

Value added at factor cost and at current prices in the primary sector decreased by 2% in 1992 as compared with the previous year.
The contribution to total value added fell to 3.6%. At constant prices, value added at factor cost in agriculture has fallen from 8.1% of the total in 1970 to 4.5% in 1992. In the same period the contribution of the service sector has increased whilst that of industry has remained stationary.
In Italy the agricultural sector is still relatively more important than in other industrialised countries, especially in terms of employment.
Trends in these variables which have emerged in recent years, however, bring Italy closer to the positions of the other countries of North and Central Europe.

VA per sector (billion lire)



(1) Including public administration and auxiliary services

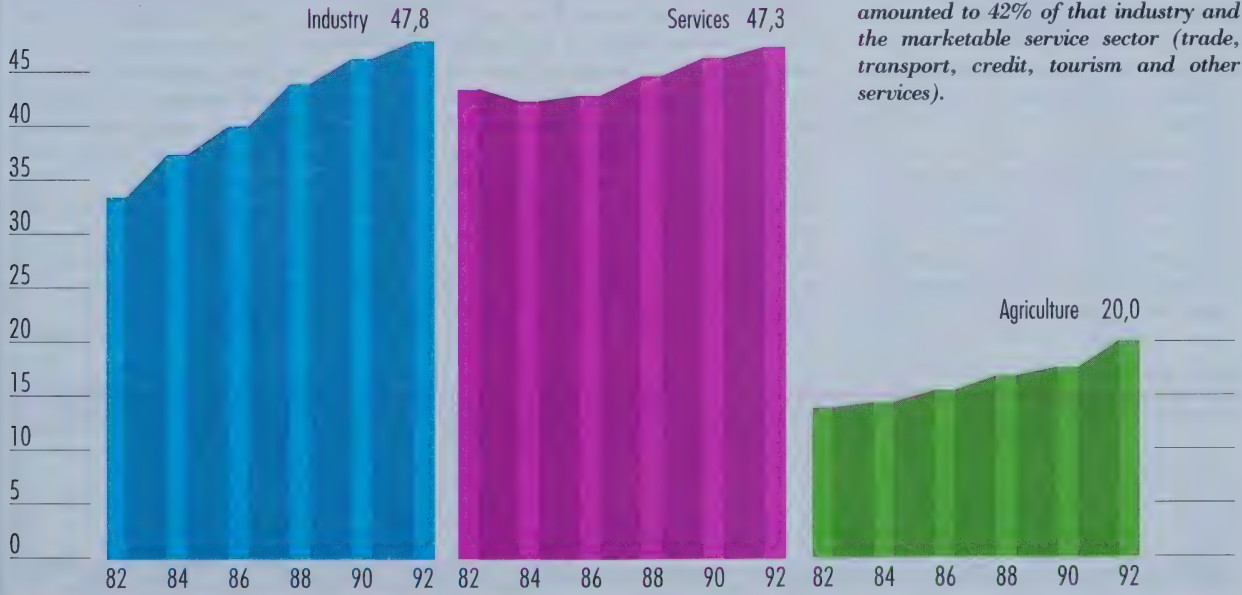
The share of agriculture in the economy as a whole

Countries	Value added (%)	Employment (%)
Italy	(*) 3,6	8,5
France	3,3	5,8
Spain	4,6	10,7
Greece	13,9	21,6
Germany (1)	1,5	3,3
Netherlands	4,0	4,5
United Kingdom	1,4	2,2
EEC	2,9	6,2
USA (2)	2,5	2,8
Japan (2)	2,5	7,2

(1) excluding GDR
(2) Source: EUROSTAT 1989

Productivity

VA / WU by sector at 1985 prices *(billion £)*



In 1992 value added per work unit at factor cost in constant prices amounted to 42% of that industry and the marketable service sector (trade, transport, credit, tourism and other services).

Production

After the revival in 1991, agricultural production increased again, by 0.5%, in 1992.Weather conditions were less subject to drought than in the past and there were several infestations of parasites, especially as regards the olive crop.

The reform of the CAP encouraged more widespread practise of extensive agriculture and of set-aside: the area sown to cereals and oilseeds decreased.Cereal production was marked by a strong increase in the cultivation of maize and reduction in that of hard wheat and of barley. As regards industrial crops,sugar beet showed a considerable increase whilst soya and tobacco declined.Trends in the production of vegetables varied: of particular significance was the decline in tomatoes and in other important crops (cauliflower and artichokes); in contrast, the production of potatoes and other minor horticultural crops rose. There was an increase in the production of flowers and of ornamental plants. As regards tree crops, there was a fairly substantial increase in citrus production whilst the olive crop reflected the adverse effects of the downturn in the two-year cycle of production, as well as of attacks from parasites.

Returns to fruit production were disappointing on account of exceptionally abundant harvests, concentrated in a short period of time, which badly affected price levels .

Vine production increased. The livestock sector showed signs of a slight revival,attributable particulalrly to meat production whilst milk production declined slightly.

VFO by sub-sector

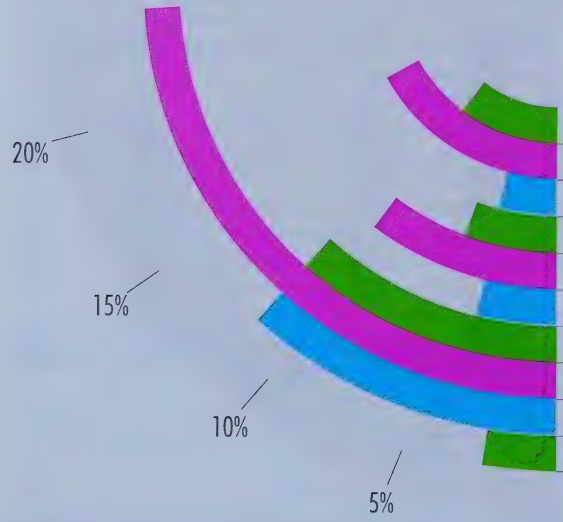
Sub-sector	North		Centre		South		Italy	
	billion lire	%	billion lire	%	billion lire	%	billion lire	%
Field crops *(incl. forage)*	8.552	28,3	3.744	43,9	9.007	41,5	21.303	35,2
Tree crops	5.747	19,0	1.818	21,3	8.166	37,6	15.731	26,0
Livestock	15.501	51,3	2.762	32,4	4.400	20,2	22.663	37,5
Forestry	395	1,3	205	2,4	156	0,7	756	1,3
TOTAL	30.195	100,0	8.529	100,0	21.729	100,0	60.453	100,0

Agricultural production in EEC member states (1991)

Country	Final output (*) million ECU	%	Crop production (*) million ECU	%	Livestock production (*) million ECU	%
Italy	39.437	19,3	24.993	23,7	14.444	14,7
Belgium	6.255	3,1	2.375	2,3	3.880	3,9
Denmark	6.606	3,2	2.235	2,1	4.371	4,4
Germany	27.231	13,3	10.126	9,6	17.105	17,4
Greece	8.782	4,3	6.278	6,0	2.504	2,5
Spain	26.037	12,8	16.051	15,2	9.986	10,1
France	46.725	22,9	25.823	24,5	20.902	21,2
Ireland	4.076	2,0	577	0,5	3.499	3,6
Luxembourg	167	0,1	26	0,0	141	0,1
Netherlands	16.175	7,9	7.176	6,8	8.999	9,1
Portugal	3.844	1,9	2.008	1,9	1.836	1,9
United Kingdom	18.660	9,1	7.789	7,4	10.871	11,0
EEC 12	203.995	100,0	105.457	100,0	98.538	100,0

(*) Exchange rate 1 ECU=lire approx. in 1991

VFO in agriculture by main sector (billion lire)



TOTAL	*59.696*	
(1) Cereals, forage and dried pulses	*6.136*	10,3 %
Horticultural	*10.076*	16,9 %
(2) Industrial crops	*2.316*	3,9 %
Flowers and ornamental plants	*3.326*	5,6 %
Grapes	*6.082*	10,2 %
Olives	*2.199*	3,7 %
Fruit including citrus	*6.898*	11,6 %
Meat	*14.346*	24,0 %
Milk	*6.877*	11,5 %
Eggs and other	*1.440*	2,4 %

(1) Forage crops were 153 billion lire, dried pulses, 139 billion lire
(2) Sugar beet, tobacco, oilseeds, textile fibres and other industrial products

Main crops and changes since 1991

Crop	Area		Yield	Harvest		Marketable output	
	000 ha	% change	ql/ha	000 t	% change	billion lire	% change
Soft wheat	988	-1,5	46,9	4.610	7,8	1.360	3,4
Hard wheat	1.531	-8,9	28,8	4.333	-15,7	1.523	-21,5
Maize	883	2,8	88,3	7.679	23,1	1.783	11,3
Rice	216	5,4	61,2	1.284	3,9	744	3,8
Sugar-beet	307	10,8	476,0	14.630	22,2	1.124	17,7
Tobacco	73	-6,4	20,8	152	-21,7	745	-3,6
Soya	355	-14,0	29,8	1.052	-20,3	364	-56,5
Sunflower	120	-9,1	21,6	254	-21,1	65	-62,0
Potatoes(new and ordinary)	111	-5,9	230,1	2.498	12,6	892	-7,4
Tomatoes	118	-9,2	506,8	5.506	-5,0	1.365	-10,6
Grapes (dessert and ordinary)	1.008	-1,6	104,6	10.420	6,4	-	-
Wine (000 hl)	-	-	-	63.800	6,7	5.346	1,8
Olives (for oil and for table)	1.131	1,4	22,0	2.300	-41,7	-	-
Oil (000ql pressed)	-	-	-	4.060	-48,4	2.038	-44,8
Apples	82	-1,2	302,3	2.394	30,8	1.284	-2,6
Pears	52	2,0	228,2	1.138	61,2	785	29,8
Peaches and nectarines	114	0,9	170,1	1.885	34,1	1.419	7,3
Oranges	108	-1,8	206,4	2.111	14,6	885	-8,0
Lemons	38	-2,6	204,5	752	5,4	582	-0,5
Mandarines and clementines	32	-3,0	163,7	500	16,8	304	7,0
Kiwi	20	-4,8	194,1	381	23,2	554	4,7

Main livestock products and changes since 1991

Types of livestock and product	Numbers		Output *(6)*		Marketable output	
	000 head	% change	000 t.	% change	billion lire	% change
Cattle *(1)*	7.547	-6,7	1.440	1,2	5.198	6,5
Pigs	8.244	-3,3	1.566	3,4	4.244	14,0
Sheep and goats	11.725	-0,2	95	2,2	416	8,3
Poultry *(2)*	173.400	0,2	1.368	0,5	3.146	-5,6
Rabbits *(3)*			360	3,2	1.265	0,7
Eggs *(4)*			11.890	-0,9	1.379	-8,1
Cows' milk *(5)*			10.174	-0,5	6.257	0,3
Sheep and goat milk *(5)*			583	-3,0	620	-2,7

(1) incl. buffaloes
(2) laying hens, hens, turkeys and guinea fowl. Source: UNA
(3) incl. game
(4) output in millions
(5) production in 000hl; buffalo milk included with cows' milk
(6) liveweight

Set-aside in the EEC (ha.)

Member states (*)	1988/89	1989/90	1990/91	1991/92	Total	Annual programme	Total
Belgium and Luxembourg	386	149	270	166	971	1.077	2.048
Denmark	0	0	4.596	8.217	12.813	1.379	14.192
Germany (**)	167.775	52.208	79.854	74.538	374.375	314.875	689.250
Greece	0	250	250	213	713	1.470	2.183
Spain	25.047	13.858	28.264	36.000	103.169	250.000	353.169
France	14.220	39.702	112.653	68.917	235.492	203.000	438.492
Netherlands	2.535	5.919	6.667	252	15.373	45	15.418
Ireland	1.141	438	187	1.686	3.452	2.500	5952
Italy	93.756	234.972	242.761	150.358	721.847	11.603	733.450
United Kingdom	52.090	48.810	28.594	23.206	152.700	12.977	165.677
TOTAL	356.950	396.306	504.096	363.553	1.620.905	798.926	2.419.831

(*) Set-aside has not been applied in Portugal
(**)In 1991/92, 104,885 ha. were set-aside in the new Landers whereas in 1990/91, 599,243 ha. were set aside on the basis of a programme of national financing.
Source: Commission of the EC, DG VI

During the four years of application of the Community programme of withdrawal of arable land from cultivation, more than 733 thousand hectares have been set aside in Italy,as compared with a total of more than 2.4 million hectares for the Community as a whole. Italy is thus the country which has made greatest use of the scheme for set-aside.

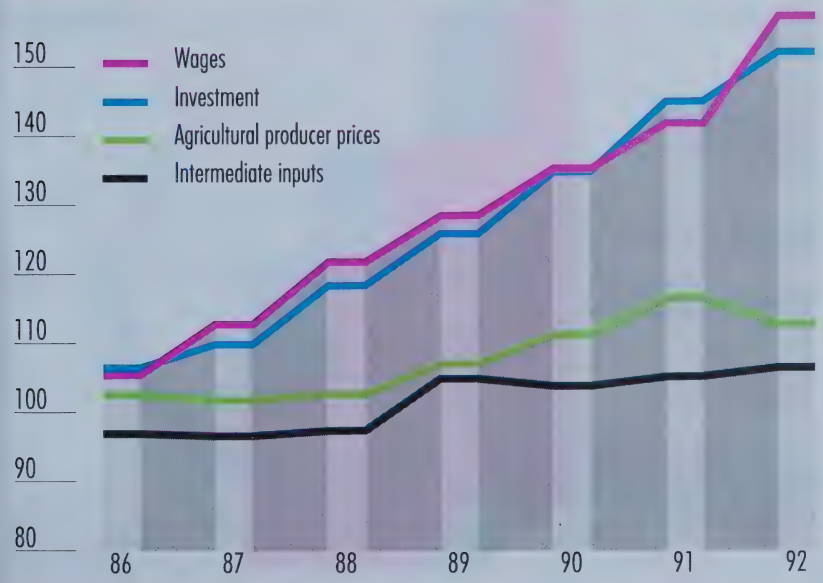
Implementation of set-aside, 1991-92

	No. beneficiaries	% of area withdrawn by type of use					
		Woodland	Non-agricultural purposes	Fallow	Fallow with rotation	Pasture for extensive grazing	Lentils, beans, vetch
Piemonte	1.735	20,5	1,6	66,7	9,5	1,7	-
Lombardia	754	41,7	1,3	48,5	5,7	2,8	-
Veneto	494	39,4	3,1	52,4	2,9	2,2	-
Friuli-Venezia Giulia	810	29,1	..	67,5	2,9	0,5	-
Liguria	4	-	-	100,0	-	-	-
Emilia Romagna	3.078	8,8	1,8	80,7	6,5	2,2	..
Toscana	8.345	3,3	0,4	51,9	22,1	22,2	0,1
Umbria	1.438	6,1	0,4	72,7	6,8	13,6	0,4
Marche	2.968	5,5	0,4	81,3	1,7	10,9	0,2
Lazio	2.290	3,7	0,1	58,2	13,3	24,7	..
Abruzzo	1.022	14,9	0,1	77,1	3,1	4,8	-
Molise	591	2,1	-	70,3	23,4	3,9	0,3
Campania	242	7,2	0,4	60,7	17,7	14,0	-
Puglia	8.586	0,6	0,1	71,6	24,5	3,0	0,2
Basilicata	9.885	1,0	-	74,2	21,1	3,4	0,3
Calabria	4.401	0,9	-	83,0	3,2	12,5	0,4
Sicilia	15.972	0,3	0,1	59,0	16,5	23,2	0,9
Sardegna	8.161	8,0	..	35,8	4,5	51,6	0,1
ITALY	70.776	4,2	0,2	60,3	14,8	20,2	0,3

Source: Ministry for Agriculture and Forests

Prices and Costs

Index numbers *(base 1985=100)*

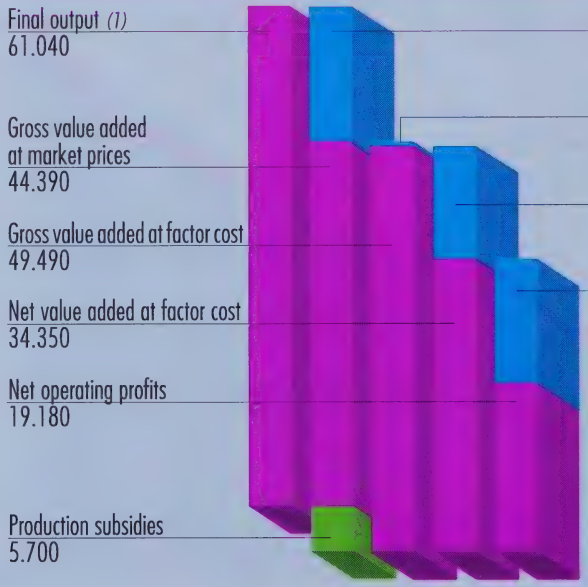


The prices of some agricultural inputs,namely intermediate inputs, energy and services,generally increase more slowly than agricultural product prices.Those of other factors of production, investment goods and labour, increase more rapidly. In 1992 agricultural product prices fell by 3.3% reflecting excess supply for certain products, particularly horticultural products, and the reduction in Community prices in the context of reform of the Common Agricultural Policy. Prices of intermediate inputs showed a moderate increase (1.2%) and those for investment goods a rise of 5.5%. The increase in the cost of labour was much more marked, both because of wage increases and of the renewal of wage contracts and on account of the increase in social security payments.

VFO and Agricultural Incomes

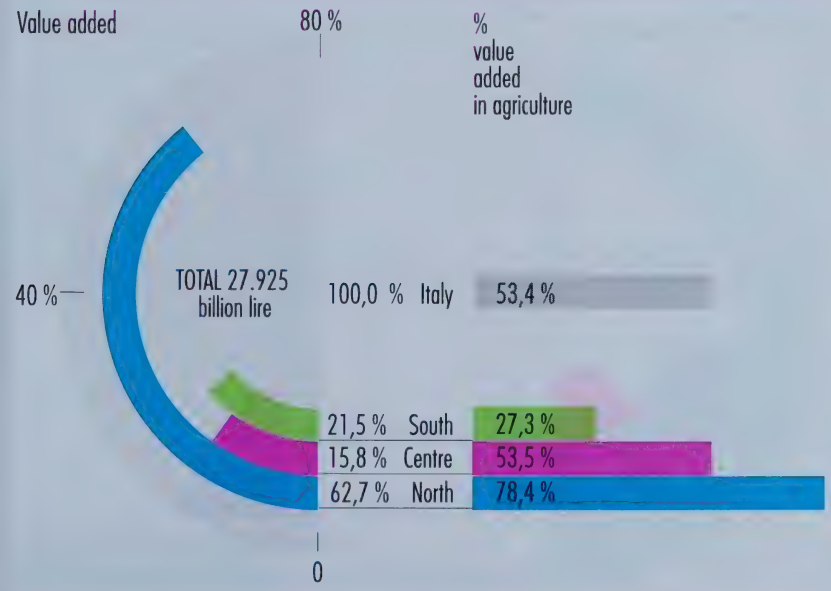
Disaggregating the value of final output (VFO) including subsidies, we find that 25% of the total is accounted for by intermediate inputs (seed, fertiliser, feed concentrates, energy etc.) and 24% by wages.Subsidies paid by State and by the EEC account for 9%.
About 30% of gross VFO went to self-employed labour (farm entrepreneurs and family workers), capital and enterprise; depreciation absorbed 23%.
As compared with 1991,net operating results declined by more than 15% at current prices.

The structure of agricultural income



(1) Including foresty, excluding fishing
Source: Calculation on ISTAT and EUROSTAT data

VA by district



The food industry is one of the main industrial activities. In 1992 value added at factor cost increased in real terms by about 1%, showing a certain stability after the increase of 4.8% in 1991.

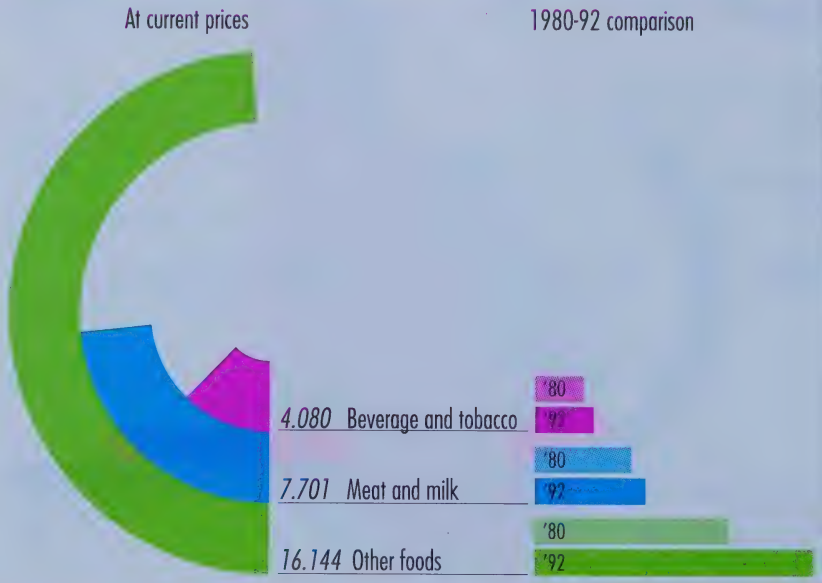
Amongst the more dynamic sectors were to be found meat, fresh , preserved and canned, baby foods and sugar refining whilst there was some stagnation in the dairy sector,particularly as regards the production of hard cheeses.

The ratio between value added in the food industry and that in agriculture rose in real terms to 56.3%: in 1982 it had been 49.6% and this is an indication of the increasing importance of the food industry in the agro-food chain.

The market for industrial food products is in continuous expansion and attracts considerable investment, both Italian and foreign.We are, moreover,

witnessing a growing concentration of firms within the industry and an imposing presence of large multinational groups.
At the same time, strong regional differences remain, with processing activities concentrated in the Centre-North. There are also structural problems due to a high number of firms of inadequate size and to those using inappropriate technology.
In the EEC area, the agro-food industry is an important sector both for employment and for value added.

VA by main sector



The food industry in the EEC (% values)

Country	% turnover	% employment
Italy	12,5	9,3
France	19,1	14,8
Germany (Fed Rep.)	20,9	19,5
Benelux	10,4	7,8
Denmark	3,2	2,6
United Kingdom	18,0	23,3
Spain	10,6	15,2
Other *(1)*	5,3	7,5
EEC	*(2)* 403.896	*(3)* 2.397,9

Production in Italy: changes

Sectors	1992/91
Milling and pasta	↑
Biscuits and bread	↓
Processing fruit and vegetables	↑↑
Oils and fats	↑↑
Butchery and meat processing	↑
Dairy products	↓↓
Sugar refining	↑↑
Confectionery	↑
Frozen foods	↑↑
Various	↑
Liqueurs	↓
Mineral water and soft drinks	—
Beer and malt	↓↓
Animal feedstuffs	—

(1) Ireland, Greece, Portugal
(2) Million ECU; exchange rate (1990) 1ECU=1520 lire approx
(3) 000 units
Source: EEC Commmission - Panorama of Community industry, statistical supplement, 1992

Retail Distribution

On 1st January 1992, 29% of all wholesalers, 34% of retail shops and 32% of mobile shops were operating in the food distribution sector.
The sales area of food supermarkets amounted to 2.9 million square metres where 70,000 persons were employed.An interesting process of rationalisation has been under way for several years in which the number of retailers is falling and modern retailing is expanding.
The share of the latter in the total food retailing sector has grown from 29% in 1981 to 60% at present (FEDERCOM, based on data from Nielsen).

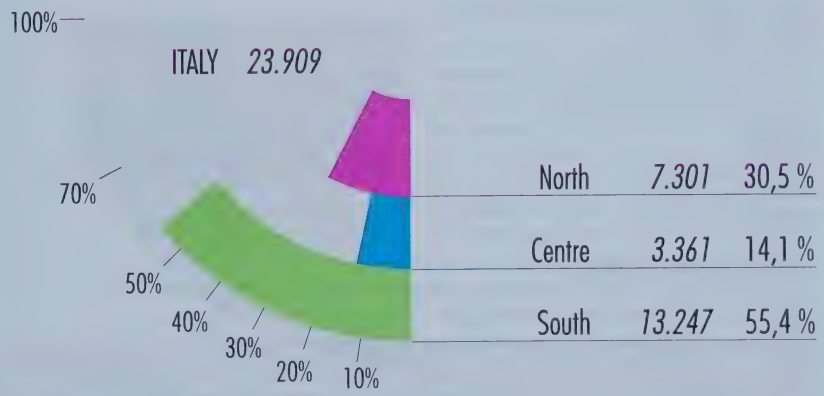
Food marketing channels by district

	North		Centre		South		Italy	
	no.	%	no.	%	no.	%	no.	% change on '82
WHOLESALE	17.626	47,4	6.331	17,0	13.219	35,6	37.176	9,9
RETAIL								
Ordinary	124.176	41,7	60.400	20,3	113.485	38,1	298.061	-12,6
Supermarkets (*)	1.941	56,1	663	19,1	861	24,8	3.465	116,7
Mobile	14.775	43,1	7.479	21.8	12.053	35,1	34.307	-34,2

(*) Supermarkets are included in retail trade
Source: calculated on data from, Ministry for Industry and Trade

Data from the Archives of the Ministry of Labour concerning numbers of the main types of agricultural cooperatives have not been up-dated in time to be published.
The table, therefore, shows data from last year. On the basis of information published in the Annual Report of the Ministry for the Budget, it can, however, be deduced that the number of agricultural cooperatives has changed, though at differing rates in different areas of the country: in the Centre-North there was a reduction of 2% whereas in the South there has been an increase of about 3%. Despite this increase several urgent problems remain, related to inadequacy in the fields of management, production and financial resources. Several legislative provisions have recently been emanated which are designed to improve operating conditions in the sector.
Amongst these, in particular, is the Law no.59 of 1992 which has introduced important innovations concerning management of cooperative societies: financing of cooperative societies by a new category of member, suitably classified;establishment of mutual funds for planning and development of cooperation.
Forms of collaboration with the area of food processing are also of great importance (joint-stock companies, joint ventures, etc.)

Agricultural cooperatives by district (1991)



Agricultural cooperatives by main category and district

	North	Centre	South	Italy
Ploughing etc.	655	716	2.663	4.034
Forestry *(1)*	252	159	192	603
Dairy	2.280	130	387	2.797
Wine cellars *(2)*	372	144	655	1.171
Oil presses	38	161	535	734
Jam, marmalades etc.	16	21	26	63
Fruit and vegetables, harvesting, processing, marketing	582	231	1.918	2.731
Milling and processing cereals	35	22	23	80
Livestock raising and meat preparations	875	449	1.064	2.388
Silkworm farming	20	2	9	31
Cultivation and first processing of tobacco	14	39	129	182
Grain storage	15	1	2	18
Sale of agricultural produce	157	117	198	472
Machinery hire	490	58	141	689
Marketing farm inputs *(3)*	325	104	388	817
Various *(4)*	477	228	760	1.465
Raising and marketing small animals *(5)*	86	66	170	322
Farm improvements *(6)*	576	668	3.687	4.931
Other	36	45	300	381
TOTAL	7.301	3.361	13.247	23.909

(1) Incl. flowers and nursery production (2) Incl. distilleries (3) Incl. Consorzi Agrari (4) Social assistance, service for members, disinfestation (5)Incl. storage, processing and sale of produce delivered by members (6) Cultivation and first stage processing of cotton and joint services for land reform areas. Source: calculated on data from Ministero del Lavoro e Previdenza Sociale, 31 December, 1990

Food Consumption

The structure of food consumption

Products	% food expenditure	annual average rate of change 1983/92	
		quantity %	price %
Bread and cereals	12,1	0,81	7,17
Meat	26,5	0,25	5,28
Fish	6,2	2,56	8,09
Dairy products and eggs	13,6	0,92	6,60
Fats and oils	3,7	0,46	6,41
Horticultural produce *(1)*	23,5	0,51	7,16
Other *(2)*	6,6	1,59	6,01
Alcoholic beverages	5,6	-1,13	7,37
Non-alcoholic beverages	2,2	6,49	8,10
TOTAL	100,0	0,71	6,52

(1) Including potatoes
(2) Coffee, tea, cocoa, sugar, sweets etc.

In 1992 household expenditure on food amounted to more than 176,000 billion lire, equivalent to about 18% of total expenditure (as compared with 19% in 1991).Purchases were on the whole stationary as compared with the previous year, reflecting saturation of demand and a lower level of disposable household income.There were slight increases for milk, cheese and eggs, fruit and vegetables. The consumption of alcoholic beverages decreased whereas those of non-alcoholic beverages increased. If the total of food consumption inside the home and outside (i.e catering) is considered,expenditure for food rises considerably to a value that can be estimated at more than 200,000 billion lire, including the expenditure of foreign tourists in Italy. The most important item of household expenditure for food is that for meat even though

its share (about 26%) is tending to decrease. This is followed, in decreasing order of importance, by fruit and vegetables with 41,000 billion, (24%), including potatoes; cereal-based products with more than 12,000 billion (12%);fish with almost 11,000 billion (6%); wine and other alcoholic beverages with 9,800 billion (5.6%). In the last ten years consumer expenditure for food has displayed the following trends: meat - decreasing; fruit and vegetables -increasing; fish -increasing; milk and eggs - increasing; wine and alcoholic beverages - decreasing.

The strong Mediterranean component in the Italian diet is clearly indicated in the levels of per capita consumption. As compared with the EEC average, in Italy consumption per head is 40% higher for cereal-based products, 50% for fruit and vegetables and about 55% for wine; in contrast, consumption of milk and pork is about 20-25% less.

Food consumption in the EEC (Kg. per head)(*)

Products	Italy	France	Spain	Greece	Germany (6)	United Kingdom	EEC12
Cereals (1)	120	77	72	106	91	77	82
Rice	6	4	6	6	2	4	4
Potatoes	39	71	106	89	75	99	78
Vegetables (2)	175	124	199	217	102	65	117
Fruit incl. citrus (2)	126	82	111	105	121	59	93
Milk (3)	75	101	92	54	93	129	(*) 102
Cheese	15	23	4	27	17	6	11
Butter	-	7	0	0	5	3	3
Total meat	83	101	91	75	94	70	87
Beef	26	30	13	23	22	19	22
Pork	32	37	49	21	58	24	39
Fats and oils	31	22	30	33	27	30	27
Sugar (4)	29	33	27	30	35	41	36
Wine (5)	62	67	44	32	26	11	40

(*) Estimates
N.B. Data refer to the crop year 1990-91; for dairy products, oils and fats and meat, to the year 1990
(1) In flour equivalent
(2) Incl. processed
(3) Incl. other fresh products
(4) White sugar equivalent
(5) Litres per head
(6) Federal Republic

The agro-food balance and the agro-industrial system (*)

	1970	1980	1992
Macro-economic aggregatesi			
Total agro-industrial production *(1)*	87.039	93.682	96.588
Imports	21.084	30.429	32.483
Exports	7.081	11.008	16.156
Balance	- 14.003	- 19.421	- 16.327
Volume of trade *(2)*	28.165	41.437	48.639
Apparent consumption *(3)*	101.042	113.103	112.915
Indicators			
Degree of self-sufficiency *(4)*	86,1	82,8	85,5
Propensity to import *(5)*	20,9	26,9	28,8
Propensity to export *(6)*	8,1	11,8	16,7
Degree of trade cover *(7)*	33,6	36,2	49,7

(*) billion lire at 1992 prices
(1) VFO for agriculture, forestry and fishing and value added for the food industry
(2) Sum of exports and imports
(3) Agro-industrial production plus imports minus exports
(4) Ratio between production and consumption
(5) Ratio between imports and consumption
(6) Ratio between exports and production
(7) Ratio between exports and imports
Source: calculated on ISTAT data

Overall agro-food production is lower than consumption and therefore the sectoral balance of trade is constantly in deficit; the rate of self-sufficiency fell between 1970 and 1980; between 1980 and 1992 it improved particularly because of the propensity to export.

Foreign trade by main category of agro-food product (billion lire)

Product	Imports	Exports	Balance	Product	Import	Exports	Balance
Crops	7.815	4.109	- 3.706	FOOD INDUSTRY	12.984	8.892	- 4.092
Cereals	2.573	111	- 2.462	Flour and pasta	41	1.510	1.469
Wheat	2.027	56	- 1.971	Rice	17	543	526
Maize	344	41	- 303	Sugar	293	119	- 174
Vegetables, fresh	721	764	43	Confectionery	476	627	151
Fruit	1.543	2.440	897	Meat	5.531	1.272	- 4.259
Citrus	37	100	63	Processed fish	907	118	- 789
Coffee, tropical beverages	646	15	- 631	Processed tomatoes	45	793	748
Oilseeds	499	13	- 486	Other proces. vegetables	662	965	303
Uncured tobacco	174	236	62	Cheese and butter	1.878	805	- 1.073
Cotton	589	14	- 575	Olive oil	821	572	- 249
LIVESTOCK	4.266	56	- 4.210	Other oils and fats	393	239	- 154
Live animals	2.538	27	- 2.511	WINE and VERMOUTH	268	1.970	1.702
Milk	1.213	12	- 1.211	OTHER BEVERAGES	666	441	- 225
FOREST PRODUCTS	1.141	93	- 1.048	OTHER PROCESSED			
FISH and GAME	2.419	189	- 2.230	AGRICULTURAL PRODUCTS	2.924	406	- 2.518
Fresh and frozen fish	2.258	184	- 2.074				
				TOTAL	32.483	16.156	- 16.327

Foreign trade in agro-food products with the EEC and third countries (1) (billion lire)

Areas and countries	Imports	Exports	Balance
EEC	22.872	10.559	-12.313
France	7.260	2.317	-4.943
Fed. Rep. Germany	4.871	4.547	-324
Belgium-Luxembourg	1.389	566	-823
Netherlands	4.486	682	-3.804
Denmark	1.345	198	-1.147
Spain	970	449	-521
Greece	1.132	284	-848
United Kingdom	1.024	1.364	340
EAST EUROPE AND ex-USSR	1.103	1.400	297
OTHER EUROPEAN COUNTRIES	1.208	1.507	299
AMERICA	3.352	1.376	-1.976
USA	859	1.055	196
Canada	172	165	-7
Brasil	706	16	-690
AFRICA	995	726	-269
Marocco	144	5	-139
Algeria	4	278	274
Tunisia	183	11	-172
MIDDLE EAST	114	341	227
CHINA	196	3	-193
JAPAN	31	164	133
OTHER (2)	727	215	-512

(1) Excl. forestry products, textile fibres, wool and other non-food agricultural products (2) Australia, New Zealand and other countries of Asia and Oceania Source:calculated on ISTAT and ISMEA data

FARM STRUCTURE

The availability of finalised data from the Fourth Agricultural Census renders possible a follow-up to the information already published in the previous edition of this booklet. In the following pages certain aspects of current interest relating to the universe of Italian agricultural holdings will be illustrated in detail.

Employment

One innovation introduced by the Census is the collection of data relating to the family of the farmer considered from a global point of view, and not merely limited to those members who have actually worked on the farm.
Farm families number 3,002,127, equivalent to 15% of all families in Italy, with a total(including only members of the nuclear family) of 8,179,161 persons (14.6% of the national total) of which 4,285,042 (52.4%) male and 3.894.119 (49.6%) female.

The average number of family members is 2.72, slightly lower than the national average of 2.83.Single person families amounted to 602,511 and those with six or more members were 117,302.

The average number of persons per family varied according to the type of farm enterprise.

On farms with hired labour, or with owner-operators but a predominance of non-family labour,the average family size was 2.13.

For farms where family labour was prevalent it rose to 2.78, but remained lower than the national average indicated by the Population Census.

The number of persons who had worked on farms was 5.8 million. Adding to this total those 2.9 million family members who had not worked on the farm, we can conclude that the number of people connected with farm holdings amounts to 8.7 million or 15.5% of the entire population.

Of the 5.8 million family members who work on-farm, 3.9 million work exclusively there and 1.9 million have activities outside the farm.
Of the 2.9 million nuclear family members who do not work on-farm, 0.7 million work outside the farm.

The sectors in which 2.5 million people work in addition to working on-farm are agriculture (18.1%), industry (32.2%), commerce (17.2%), services (19.4%) and public administration (13.1%).

The percentage of female labour in agriculture has remained almost stationary as compared with the last Census, amounting to slightly less than a third of total farm labour.

The percentage of farms with a residence within the farm boundary is 51.9% and the total number of houses is 1,886,527. The houses occupied by the farmer and members of his family are usually supplied with adequate services and in 75% of cases also have the use of a telephone.

Composition of the labour force by altimetric zone

	TOTAL	Nuclear and extended family of the farm operator				Other labour		
		Operator	Spouse	Other nuclear family	Other kinsmen	Permanently employed labourers	Labourers on short contracts	Share croppers and similar
FARMS (%)								
Mountains	659.213	99,0	62,0	20,4	10,2	1,0	14,0	0,7
Hills	1.523.578	99,4	69,2	18,4	9,5	1,0	21,1	0,9
Plains	840.553	99,3	72,2	22,8	10,9	1,9	22,2	0,8
Total	3.023.344	99,3	68,9	20,1	10,0	1,3	19,8	0,8
DAYS WORKE (%)								
Mountains	91.135.214	50,1	18,7	13,5	4,9	2,3	10,0	0,5
Hills	211.511.149	32,9	11,9	8,4	3,2	2,1	9,0	0,4
Plains	157.779.297	43,4	14,1	15,8	6,7	5,4	14,0	0,7
Total	460.526.450	47,0	16,5	13,7	5,5	3,8	12,8	0,6
VG. DAYS WORKED PER YEAR								
Mountains	138	70	40	91	67	313	99	98
Hills	139	68	35	93	70	423	87	106
Plains	188	82	37	130	114	541	118	165
Total	152	72	37	104	83	452	99	120

Composition of labour force by district

	TOTAL	Nuclear and extended family of farm operator				Other labour		
		Operator	Spouse	Other nuclear family	Other kinsmen	Permanently employed labourers	Labourers on short contracts	Share croppers and similar
FARMS (%)								
North	904.898	98,7	65,8	24,1	12,7	2,3	7,6	0,3
Centre	527.393	99,0	71,8	19,1	10,4	1,8	9,8	0,9
South	1.591.053	99,8	69,8	18,0	8,4	0,5	30,1	1,0
ITALY	3.023.344	99,3	68,9	20,1	10,0	1,3	19,8	0,8
DAYS WORKED (%)								
North	180.272.434	48,9	16,0	17,1	7,0	5,7	5,2	0,2
Centre	73.424.831	48,4	18,9	12,9	5,0	6,2	8,0	0,5
South	206.829.195	44,9	16,3	11,1	4,3	1,2	21,2	1,0
ITALY	460.526.460	47,0	16,6	13,7	5,5	3,8	12,8	0,6
DAYS WORKED PER YEAR								
North	199	99	48	141	109	482	138	108
Centre	139	68	37	94	67	487	114	90
South	130	58	30	80	67	327	91	131
ITALY	152	72	37	104	83	452	99	120

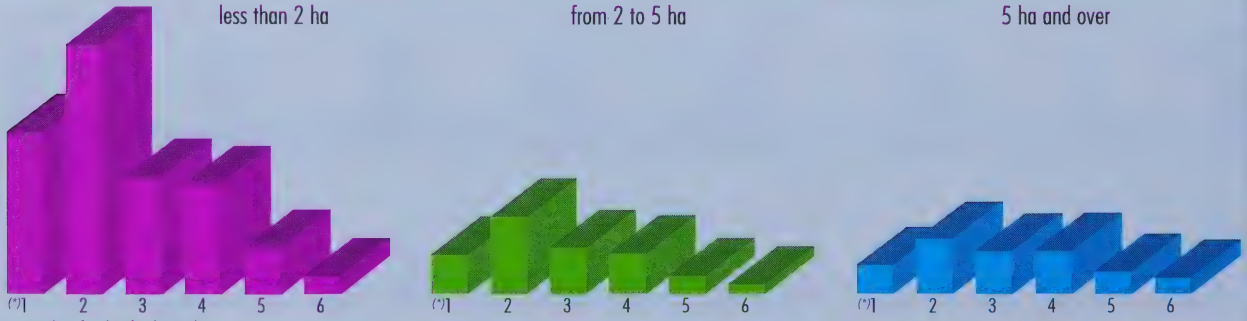
Members of the farm operator's family

	TOTAL	Operator	Spouse	Other kinsmen		Other nuclear family
				working on the farm	Not working on the farm	
MALES and FEMALES						
Mountains	1.767.607	652.887	422.054	200.988	396.237	95.441
Hills	4.246.582	1.514.852	1.054.980	414.422	1.059.386	202.942
Plains	2.600.818	834.388	606.782	295.292	726.893	137.463
Total	8.615.007	3.002.127	2.083.816	910.702	2.182.516	435.846
MALES						
Mountains	939.154	465.158	81.734	131.508	199.997	60.757
Hills	2.260.808	1.118.568	187.866	280.558	531.507	142.309
Plains	1.386.689	636.273	95.856	201.995	354.022	98.543
Total	4.586.651	2.219.999	365.456	614.061	1.085.526	301.609

Farm operator's family by no. of members

Size of UAA	No. of nuclear family members						TOTAL
	1	2	3	4	5	6 and over	
Less than 2ha	423.845	1.305.864	927.045	1.156.324	603.230	309.569	4.725.877
2-5 ha	102.618	407.296	359.679	423.900	238.625	160.316	1.692.434
5ha and over	76.048	291.696	341.130	457.372	297.490	297.114	1.760.850
TOTAL	602.511	2.004.856	1.627.854	2.037.596	1.139.345	766.999	8.179.161

Number of families by size of UAA



(*) Number of nuclear family members

Employment of members of the farm operator's family

Category of labour	Exclusively on farm	Mainly on farm	Mainly in other sectors	TOTAL
Operator	2.078.996	65.235	857.896	3.002.127
Spouse	1.068.469	20.385	455.152	1.544.006
Other nuclear family	565.692	20.327	889.494	1.475.513
Other kinsmen	208.075	9.481	218.290	435.846
TOTAL	3.921.232	115.428	2.420.832	6.457.492

Off-farm employment of family members (*no. persons*)

Sector of employment	Secondary	Exclusive or main	TOTAL	%
Agriculture	79.856	379.111	458.967	18,1
Industry	10.250	806.449	816.699	32,2
Commerce, catering, hotels	11.149	424.951	436.100	17,2
Services	10.882	479.975	490.857	19,4
Public administration	3.291	330.346	333.637	13,2
TOTAL	115.428	2.420.832	2.536.260	100,0

This phenomenon, linked with the evolution of mechanisation in agriculture, must be seen in the context of the economic choices made by the farmer, who finds it preferable to turn to the market to obtain farm services rather than to immobilise his own capital for this type of activity.

There are 46,682 agricultural enterprises which carry out work on other farms (1.5% of all farms), for a total of 1.4 million days labour (active contracting).The number of farms which make use of services supplied by completely extraneous labour is 1.6 million (55% of all farms) for a total of 6.1 million days (passive contracting).From this it can be deduced that the number of days worked on farms by farm labour and by labour supplied by service enterprises amounts to 466.6 million.

Number of days worked by contractors

Farms associated with agricultural contracting

Utilisation of machines	Mountains	Hills	Plains	ITALY
On other farms	10.267	23.251	13.164	46.682
belonging only to the farm	9.038	18.823	9.678	37.539
in joint ownership	1.354	4.683	3.709	9.746
On farm, supplied by	268.999	841.268	551.818	1.662.085
other farms	152.111	391.199	183.320	726.630
producers' associations	2.396	14.249	20.993	37.638
hiring firms	129.552	474.089	380.838	984.479

Purchase of Farm Inputs

The majority of farms purchase inputs from external suppliers, generally from sources other than agricultural enterprises and producers'associations. About three quarters of farms buy fertilisers but external purchases are more limited for pesticides and herbicides (62.3%), seeds and plants (44.1%), fuels and oil (47.3%).
As regards livestock production, only 8.1% of farms purchase animals, 15.7% feed concentrates and forage and 7.8% medecines.

Farms which purchase inputs

Inputs	Total	Type of supplier (%)		
		Other farm	Producers' association	Other supplier
Fertilisers	2.243.625	2,2	33,2	64,6
Pesticides and herbicides	1.882.787	1,4	33,1	65,5
Seeds and plants	1.332.669	3,2	34,7	62,1
Livestock	244.381	19,0	9,7	71,3
Feedstuffs and forage	473.338	3,3	25,9	70,8
Medecines	236.566	1,3	15,3	83,4
Equipment	182.939	2,6	20,1	77,3
Fuel and oils	1.429.959	0,6	28,5	70,9
Other inputs	26.527	7,0	19,7	73,3

Marketing of Farm Produce

About 63% of farms produce for the market;this activity is less common on farms of very small dimensions whilst it affects more than 90% of those between 50 and 100 hectares in size.For the remainder of farms, production is effectively for home consumption.
More than 86% of farms market crops whilst only 19% sell all or part of their output of livestock products and 2.3% market forest products.
As regards the marketing of crops,methods preferred by farmers are delivery to producer associations (26.9%), sales to industrial or commercial firms (29%) and sales to other enterprises (38%).

Farms which market produce (*)

(*) % of all farms grouped by size of total area

5 ha and over	*631.701*	(*) 87,1 %
from 2 to 5 ha	*525.189*	(*) 74,0 %
less then 2 ha	*755.860*	(*) 47,6 %

Methods of marketing by type of product

Type of product	Total farms	% Farms with				
		Direct sales	Conferral to cooperatives	Conferral to producers' associations	Sale to industrial or commercial firms	Conferral or sales to others
Crops	1.649.771	16,1	25,9	8,3	29,0	38,0
Livestock	363.205	23,8	15,6	8,5	38,7	38,4
Processed produce	299.273	66,8	4,6	1,7	6,5	21,9
Forest products	44.326	40,6	0,7	0,3	22,8	35,9

Farm Management Accounting

Of the total of all farms, i.e. 3,023,344, those which systematically record receipts and payments are 11.5% and of these 4.1% keep an inventory and/or a balance sheet.

As compared with the situation revealed by the previous Census, there has been a reduction of 18,213 in the first category of farm, and of 27,570 for those keeping an inventory.

The highest percentage of farms keeping accounts is to be found amongst those with between 5 and 20 hectares of utilised agricultural area whilst, in contrast with what might have been expected, the habit is not widespread amongst the larger farms.

Accounting is more common on share-tenancy holdings (36%), followed by those with hired workers (28.3%) whilst only 10.7% of owner-occupiers keep accounts.

Considering the legal status of the holding, almost all corporations (companies, cooperatives) keep accounts whilst the percentage falls to 53.8% amongst public bodies and to as low as 11.0% for farms managed by individuals.

Farms with systems of accounting and computers

Size of UAA	With accounting			With computer		
	Registration of receipts and expenditure	Inventory and/or budget	TOTAL	Administrative services	Crop and/or livestock management	other operations
Less than 2ha	62.432	22.441	906	740	237	93
2-5 ha	67.183	21.112	742	637	178	69
5ha and over	217.887	79.853	5.955	4.497	2.407	574
TOTAL	347.502	123.406	7.603	5.874	2.822	736

ECONOMIC PERFORMANCE - RESULTS FROM THE FADN

Farm Incomes in 1991

The Farm Accounting Data Network was established at Community level by Regulation 79 of 1965 and its main objective is the systematic collection of information necessary to measure trends in farmers' incomes and in the performance of farm enterprises. At present in Italy 18,000 farms are included in the survey sample. The Regional administrations and farmers' organisations take part in the collection of data; accounting methods and procedures are those of INEA which is also the institution officially responsible for coordination between the Italian state and the EEC for management of the Network.The farms which take part in the FADN are subjected to a system of survey which illustrates their structural characteristics, factor endowment and cost structure. All this information is available on computer systems at each regional office of the INEA.

Average farm data by altimetric zone, 1991

District	No. farms	UAA	WU	VFO	Variable costs	Fixed costs	Net income
		ha	n.	000 lire			
TOTAL	19.094	17,31	1,83	69.774	32.550	15.697	29.765
Mountains	4.021	19,86	1,78	55.765	26.561	12.865	25.576
Hills	9.627	16,93	1,77	58.289	24.393	13.476	25.653
Plains	5.446	16,09	1,96	100.421	51.390	21.714	40.125

Average farm data by district, 1991

District	No. farms	UAA	WU	VFO	Variable costs	Fixed costs	Net income
		ha	n.	000 lire			
TOTAL	19.094	17,31	1,83	69.774	32.550	15.697	29.765
North	7.014	17,89	2,11	103.465	53.041	23.787	41.222
Centre	4.285	18,27	1,86	57.627	24.948	15.060	23.513
South	7.795	16,24	1,56	46.136	18.290	8.768	22.893

Data by district-changes 1992/91

District	VFO		% change	Variable costs		% change	Fixed costs		% change	Net income		% change
	1990	1991		1990	1991		1990	1991		1990	1991	
TOTAL	64.527	69.774	8,1	30.637	32.550	6,2	13.278	15.697	18,2	28.497	29.765	4,4
North	99.809	103.465	3,7	50.632	53.041	4,8	20.796	23.787	14,4	42.158	41.222	-2,2
Centre	51.025	57.627	12,9	22.729	24.948	9,8	11.238	15.060	34,0	22.961	23.513	2,4
South	38.524	46.136	19,8	16.115	18.290	13,5	7.031	8.768	24,7	18.686	22.893	22,5

Average farm data by ESU, 1991

District	No. farms	UAA	WU	VFO	Variable costs	Fixed costs	Net income
		ha	no.		000 lire		
TOTAL	19.094	17,31	1,83	69774	32.550	15.697	29.765
2-4 ESU	1.477	5,21	1,11	14.311	5.664	4.126	6.299
4-8 ESU	4.218	8,15	1,30	22.970	9.455	6.229	10.193
8-16 ESU	5.832	13,35	1,60	42.421	17.568	10.400	19.424
16-40 ESU	5.181	22,37	2,07	83.954	37.986	18.488	37.360
40-100 ESU	1.985	34,02	2,91	179.088	89.251	36.914	73.917
over 100 ESU	401	67,41	4,90	439.872	241.475	93.850	155.773

Average farm data by principal types of farm, 1991

District	No. farms	UAA	WU	VFO	Variable costs	Fixed costs	Net income
		ha	no.		000 lire		
TOTAL	19.094	17,31	1,83	69.774	32.550	15.697	29.765
Arable	4.557	20,47	1,62	60.304	23.576	14.871	23.503
Horticulture	1.201	1,64	2,26	90.716	33.428	17.294	40.035
Permanent crops	4.436	8,11	1,65	54.220	14.591	12.688	27.187
Herbivorous animals	4.171	27,68	2,07	97.376	61.611	19.974	40.266
Granivorous animals	35	9,71	2,39	371.455	229.101	35.960	116.158
Mixed crops	2.076	13,58	1,70	50.614	18.167	12.616	22.565
Mixed livestock	638	15,71	1,89	50.043	27.171	12.521	22.091
Mixed	1.980	22,83	2,04	76.682	45.021	18.258	30.095

PRODUCTS OF SPECIFIC GEOGRAPHICAL ORIGIN AND WITH SPECIAL CHARACTERISTICS

Dairy products

The law of 10th April,1954,no.125 recognises as products of specific geographic origin (DO) those cheeses produced within a limited geographic area, consistently using local methods and whose characteristics derive mainly from the specific conditions of the environment in which they are produced. The same law recognises as products with special characteristics those cheeses produced on national territory consistently using local methods and whose characteristics derive from particular techniques of production.

Cheeses of specific geographical origin

Asiago
Bra
Canestrato Pugliese
Caciotta d'Urbino
Castelmagno
Fiore Sardo
Fontina
Formai De Mut dell'alta Valle Brembana
Gorgonzola
Grana Padano
Montasio
Murazzano
Parmigiano Reggiano
Pecorino Romano
Pecorino Sardo
Pecorino Siciliano
Pecorino Toscano
Raschera
Robiola Roccaverano
Taleggio

Cheeses with special characteristics

Caciocavallo
Pressato
Provolone
Ragusano
Mozzarella Bufala
Toma

Hams and salame of specific geographical origin

The following products have been recognised, by appropriate laws, as being of specific geographical origin :

Prosciutto di Parma
Prosciutto di San daniele
Prosciutto Berico-euganeo
Prosciutto di Modena
Salame di Varzi

Wines of specific geographical origin

The law of 10th February,1992, no.164 regulates denomination of wines of specific geographical origin. By denomination of specific geographical origin for wines is understood the geographical name of a particular wine producing area, used to indicate a well-known and quality product whose characteristics are dependent on the natural environment and skills. By typical geographic indication for wines is understood the geographic name of an area used to indicate the product emanating from it.

These products are classified into

- *denomination of controlled and guaranteed origin (DOCG);*
- *denomination of controlled origin (DOC);*
- *typical geographic indication (IGT)*

DOC Italian wines by Region

Valle D'aosta	1
Piemonte	35
Liguria	4
Lombardia	13
Trentino-alto Adige	12
Veneto	16
Friuli-venezia Giulia	8
Emilia Romagna	14
Toscana	23
Marche	10
Umbria	8
Lazio	19
Abruzzo	2
Molise	2
Campania	10
Basilicata	1
Puglia	24
Calabria	8
Sicilia	9
Sardegna	18

N.B. The total number of Italian DOC wines is 232, less than the sum of Regional wines because some are inter-regional.

Wines of specific geographical origin and guaranteed (DOCG)

Region	*Origin*	Additional information appearing on the label
PIEMONTE	Barbaresco	riserva
	Barolo	
	Gattinara	riserva
EMILIA ROMAGNA	Albana di Romanga	
TOSCANA	Brunello di Montalcino	riserva
	Carmignano	riserva
	Chianti	classico, riserva Colli Aretini, Colli Fiorentini, Colline Pisane, Colli Senesi, Montalbano, Ruffina
	Vino nobile di Montepulciano	riserva
UMBRIA	Monfalco sagrantino	
	Torgiano	riserva
CAMPANIA	Taurasi	riserva

INSTITUTIONS AND LEGISLATION

The Framework of Responsabilities

The framework of responsibility as regards agriculture is regulated by the following laws:

- *Law no.281 of 16th May 1970 and the subsequent Presidential decree no. 11 of 15th January 1972*
- *Law no.382 of 22nd July 1975 and the subsequent Presidential decree no. 616 of 24th July 1977.*

Both transfer to the Regional authorities the greater part of responsibility for agriculture. Thus all the measures most directly related to production have become subject to Regional intervention, including:

- *Crop production and livestock rearing*
- *Collection, processing and distribution of produce*
- *Extension and professional training*

As stated in article 4 of the Presidential decree 616/77 "the Central Government shall excercise the function of guiding and coordinating... and, also for those areas of responsibility transferred or delegated, functions concerning international relations, those with the European Economic Community, national defence and public security".

In particular, in agriculture, the main responsibilities of the Central authorities concern:.

- *research, experimentation and information of national interest*
- *measures of national interest for regulating agricultural markets - guarantee of security in supplies*
- *the organisation of international trade*
- *the fund for national solidarity in case of catastrophe or adverse climatic conditions.*

In the process of national planning, for the purpose of carrying out policies for production, agricultural markets and food, the Central authorities decide:

- *the orientation of production and objectives*
- *areas of the country to be given preference*
- *maximum levels for incentives*
- *measures for implementing market policies*
- *general guidelines for implementing EEC regulations and directives*
- *financial coordination between regional and national intervention measures as regards markets.*

Planning and Legislation Governing Intervention

Planning in the Italian agricultural sector for the five-year period 1986-90 is governed by the National Plan for Agriculture drawn up by the Ministry for Agriculture and Forests in accordance with its responsibilities for guiding and coordinating the sector. The National Plan has the following objectives:

Central objective
Support to and development of agricultural incomes.
This objective is to be pursued by improving the efficiency of the farm enterprise in a market-oriented agricultural sector designed to make the maximum contribution to the stable economic growth of the nation.

Specific objectives
- *Maintenance of employment in agriculture, especially of young people, and particularly in economically backward areas, in order to open up opportunities for mixed activities.*
- *Promotion of balanced economic growth, evenly spread over national territory.*
- *Protection of land, environment and water resources.*
- *Maintenance of a degree of self-sufficiency in food compatible with resources and national agricultural productivity.*

The Plan is made up of a set of sub-programmes. These are:

An outline plan
The first edition was approved by the CIPAA (Interministerial Committee for Food and Agricultural Policy) on 1st August 1985. There have subsequently been two updated versions: the first was approved by CIPE (Interministerial Committee for Economic Planning) on 23rd April 1987, the second, at present in force, on 13th October 1989.

Sectoral plans
- *Olives and olive oil;*
- *Grapes and wine;*
- *Sheep and goats;*
- *Bee-keeping;*

approved by CIPE on 28th June 1990.

Action plans
- *Against plant pests and diseases;*
- *Against low fertility rates.*

The National Plan for Agriculture reconciles objectives and measures in national policy with those of Community policy and both in analytical terms and with regard to the future, emphasises the importance of a synergy of initiatives. In fact, the greater part of intervention measures in Italy are governed by EEC Regulations the most important of which are illustrated in the following table.

In recent years the Common Agricultural Policy (CAP) has been subject to change in order to adapt to new circumstances as well as to the evolution of markets and of technology. Great efforts have, in fact, been made to limit surplus production and expenditure and to avoid a decline in farm incomes.

The first measures for reform were taken in 1979.In the face of continuous increases in the surplus of dairy products it was decided to apply a co-responsibility levy; in 1984 quotas for dairy produce were established and in 1988 the mechanism of automatic stabilisers was introduced. In June 1992 the Council approved the most radical reform package since the introduction of the CAP thirty years earlier.

The main structural Regulations of the EEC

Agriculture	
REG. 2328/91 (*)	improving the efficiency of agrarian structures
REG. 2078/92	methods of agricultural production compatible with environmental protection
REG. 2079/92	aid for early retirement in agriculture
REG. 2080/92	aid to forestry measures in the agricultural sector
REG. 2088/85	integrated Mediterranean programmes
REG. 2052/88	the emission of structural funds, their effectiveness, coordination with EIB and other financing agents
REG. 4256/88	implementation of measures through EAGGF Orientation Fund
REG. 866/90	improvement of conditions for marketing and processing agricultural products
REG. 867/90	improvement of conditions for marketing and processing forestry products
REG. 1401/86	action for improving agriculture in some less-favoured areas of northern Italy
REG. 768/89	transitional aid to agriculture
REG. 1360/78	producers' associations and their unions
REG. 1035/72	producers' organisations in the horticultural sector

(*) which codifies REG 797/85 and successive modifications

Structural measures for limiting production	
REG. 1442/88	premia for eliminating vineyards
REG. 822/87 e 2741/89	national aid for planting vineyards
REG. 1200/90	improving Community production of apples
REG. 2066/92	premia for raising cattle for beef and for dairy production
REG. 1336/86	compensation for abandoning milk production
REG. 3493/90	premia for raising sheep and goats

Fishing and aquaculture	
REG. 4028/86	improvement of structures in the sectors of fishing and aquaculture
REG. 4042/89	improvement of conditions for processing and marketing the produce of fishing and aquaculture

The main objectives of the reform were:

- *to enable the Community to preserve its position as an important producer and exporter of agricultural products and to become more competitive on both home and export markets;*
- *to reduce output to a level nearer to market demand;*
- *to give priority, in the erogation of income aids, to those farmers with the greatest need;*
- *to encourage farmers to remain in the countryside;*
- *to protect the environment and to develop the natural potential of rural areas.*

The central element in the reform package pivots on certain key products for which a reduction in price is foreseen, and on the withdrawal of land from production.

Farmers will receive direct compensation for loss of income.
The measures apply to land under cereals, oilseeds and protein crops as well as to beef.

Cereal prices will be reduced by 29% over three years starting from 1993-94 and will be brought nearer to levels prevalent on world markets.A certain amount of land will,moreover, be withdrawn from the production of cereals each year and could be used for non-food purposes such as growing cereals for the manufacture of fuels. The prices of beef will also be reduced, by 15% in the space of three years.
This reduction will be compensated by supplementary premia for cattle raised on open pasture so as to encourage extensive farming; no premia will be paid to farmers raising cattle in sheds in that the fall in price will be compensated by lower prices for cereal feedstuffs.

Alongside the change in market mechanisms for single products are introduced a series of "accompanying measures":

- *to promote types of farming practise less harmful to the environment through diminished use of pesticides and fertilisers (Reg. 2078/92),*
- *the Community favours early retirement for farmers of 55 years and over, in order to give greater opportunities to young farmers (Reg. 2079/92),*
- *to finance re-afforestation and to encourage rational management of land withdrawn from production (Reg. 2080/92).*

MGQ and MGA for main products in the 1992-93 season

MGQ	Sugar *(1)*		
	Quota A		11.187
	Quota B		2.488
	Tobacco *(2)*		390
	Olive oil		1.350
	Oranges *(3)*		1.179
	Peaches *(3)*		280
	Apples *(3)*		242
	Processed products *(4)*		
	Concentrate of tomatoes	EUR 11	4.284
		Germany	33,7
	Canned tomatoes		1.543
	Other	EUR 11	735
		Germany	1,3
	Milk		101.672
MGA	Sunflower	EUR 10	1.202
		Spain	1.411
		Portugal	122
	Soya		509

MGQ=Maximum Guaranteed Quantity (000t) MGA=Maximum Guaranteed Area (000 ha); (1) White sugar equivalent (2) Leaf tobacco (3) Intervention limit (4)Guarantee limit

Agricultural Stabilisers

In order to bring agricultural markets into equilibrium and to reduce budget problems, from 1988 onwards the European Community has introduced mechanisms for limiting production known as agricultural stabilisers. They are in operation for all the products subject to the common organisation of the market and automatically reduce the level of support if maximum guaranteed quantities (MGQ) or maximum guaranteed areas (MGA) are surpassed.

LAW 752/86 and LAW 201/91

The legal instrument governing finance for the National Plan for Agriculture is law no. 752 of 8th November 1986: "The law on expenditure over several years for measures planned in the agricultural sector". As foreseen in the Outline Plan, this law provides for financing for measures undertaken by the Central Government and by those of the Regions, authorising overall expenditure for the period 1986-1992 of 19,552 billion lire. In response to proposals by the Ministry for Agriculture and Forests, each year the CIPE (Interministerial Committee for Economic Planning) approves the deliberations through which the National Plan for Agriculture is implemented and provides for the measures foreseen by the Plan using the financial means made available through the law no. 752/86.As has happened since 1986, in 1992 financial measures were taken in the sector on the basis of the law 752/86 and its two year prorogation, law 201 of 10th July, 1991.

On 31st January 1992 the CIPE allocated 1,000 billion lire, to be divided between the Ministry of Agriculture and Forests, the Regional governments and the Autonomous provinces.

Finance erogated under Law no. 752/86

CIPE deliberation	Allocation (million lire)
17th December 1986	2.765
23rd April 1987	2.993
14th June 1988	3.250
2nd May 1989	3.292
15th May 1990	3.029
2nd August 1991	3.052
31st January 1992	1.000

The National Plan for Forests

This plan was envisaged in article 2 of the law no.752/86 and was approved by the CIPE in December 1987. The objectives include the establishment of consortia for the management of forest resources, measures to help firms as regards technological development and the maintenance and development of forests, a policy for the improvement of infrastructure, the establishment of urban parks.

Law no. 183/87

This guarantees finance for Communityn Regulations through a rotating fund at the Ministry for the Treasury.With reference to this law, on 12th August, 1992, the CIPE allocated 470 billion lire, the greater part of which in support of Regulation 1094/88 (set-aside) and of Regulation 2052/88 (reform of structural funds).

Law no. 88/88

This law concerns inter-professional agreements and contracts for the cultivation and sale of agricultural products for processing or for marketing unprocessed.
The law attempts to regulate supply so as to bring it into line with demand in foreign and domestic markets, to improve the quality of production, to establish criteria and general conditions for production and sale of products and for supplying services, to fix product prices in advance or criteria for the determination of prices.
The Ministry of Agriculture may intervene in establishing agreements, in particular as regards the product concerned, the method and timing of delivery, the minimum price, the method and timing of payment, quantity and quality requirements, the period for stipulating contracts.

Law no. 87/90

Law no. 87 was approved on 9th April 1990 for "urgent measures in the livestock sector" aimed at restructuring production and marketing in the sector in order to adapt to the needs of the market.
To this end, a five-year fund has been established at the Ministry for Agriculture and Forests with a dotation of 340 billion lire.

Law no. 181/82

"Arrangements for drawing up the annual and pluri-annual State budget". This established the Fund for Investment and Employment, implemented by the Ministry for the Budget.
For agricultural projects a consultative liaison committee was established within the Ministry for Agriculture and Forests.

APPENDIX

Glossary

Intermediate agricultural inputs
Expenditure on intermediate agricultural inputs is that for seed, fertilisers, pesticides, feed compounds and other expenditure for livestock, energy, irrigation water and various services.

Agricultural contracting
Is the supply of labour to third parties by appropriately qualified firms, with or without the use of agricultural machinery.

Production subsidies
Premiums and payments erogated by public bodies in favour of the agricultural sector.

Fixed costs
Costs incurred for employing factors of production with lives of several years:amortisation,interest, land rents,expenses connected with labour employed on a permanent basis.

Variable costs
Costs incurred for the employment of single use factors of production:seeds, fertilisers, pesticides, energy, hiring charges, casual labour.

Types of enterprise

- *owner-operator*
- *farms with hired labour and/or share-croppers*
- *share-tenancy*
- *other forms*

TF
Types of farming
The classification of farms by type of farming is based on determination of the economic performance of the various productive activities carried out on the farm and the combination of these activities.
For this purpose, the numbers of hectares cultivated or livestock raised are multiplied by the SGM of the zone in which the farm is located.
The resulting combination is compared with a typology classification scheme which is used to define the TF on the basis of criteria defined at Community level and is valid for official statistics.
A farm is classified as specialised when the SGM of one activity or of several similar activities exceeds 2/3 of total SGM on the holding.

GDP
Gross Domestic Product
Is the outcome of productive activities carried out on national territory; it is equivalent to the overall value of goods and services produced within a determined territory within a specified period of time, which is usually a calendar year.
It does not include the value of intermediate output.

VFO
The value of final output
Is the value of production that can be sold and therefore, in agriculture, it is equal to the harvested crop minus the share re- used on the holding as a means of production.

SGM
Standard Gross Margin
This is the parameter determined for each productive activity by the difference between the value of final output and the sum of certain specific costs (seed, fertiliser, pesticides, feedstuffs, forage etc.), excluding those for labour and machinery.
Gross margins calculated in this way are defined as "standard" in that the value of final product and costs are calculated on a three- year average, with reference to the altimetric zone of each region.The SGM are expressed in European Units of Account (ECU) and up-dated by INEA when surveys of farm structures or the agricultural census of ISTAT take place.
The sum of SGM from all the productive activities on the farm corresponds with its economic dimension and is expressed in ESU(European Size Units).

Net Income
Is the reward to all factors of production belonging to the farm entrepreneur: land, labour and capital.

UAA
Utilised Agricultural Area
Is made up of all agricultural land, permanent meadows and pasture, agricultural tree crops, household gardens and groves for (edible) chestnuts.

Total farm area
In the surveys on farm structure this means the total of UAA, cultivated woodland (woods and poplar groves), unutilised agricultural areas and other areas within the perimeter of the farm.
It differs, thus, from the definition used in annually published agricultural statistics in that in the latter case is included land abandoned and not forming part of a holding.

Access to UAA
The relationship between enterprise and farm capital. It can be:

- *ownership*
- *rent.*

ESU
European Size Unit
For 1987 each Unit is equal to 1,200 ECU or 1,671,000 lire (1 ECU=1,323 lire). Thus a holding with a total SGM of 7850 ECU has an economic size of 6.54 ESU.

WU
Work unit

According to the EEC definition for the structural surveys a Work Unit is equivalent to the work of one person who is engaged for at least 2,200 hours in the course of the year.

VA
Value added

Is the sum of the difference between the value of production of goods and services from individual productive sectors and the value of intermediate goods and services used up in the period specified. It coincides with the sum of remuneration of factors of production and of depreciation in each sector.

Value added at factor cost, as distinct from that at market prices, includes any subsidies erogated by the public administration to the different productive sectors.

Useful Addresses

MINISTRY FOR AGRICULTURE AND FORESTS
Via XX Settembre, 20 - Roma

REGIONAL DEPARTMENTS OF AGRICULTURE
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Roma - Via Nizza, 128
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Roma - Viale Castro Pretorio, 118
Ente Nazionale Cellulosa e Carta
Roma - Viale Regina Margherita, 262/e
Ente Nazionale Previdenza e Assistenza per gli Impiegati dell'Agricoltura
Roma - Viale Beethoven, 48
Ente Nazionale Risi
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Ente Nazionale delle Sementi Elette
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Federazione Italiana Consorzi Agrari
Roma - Via Curtatone, 3
FATA
Fondo Assicurativo Agricoltori
Roma - Via Urbana, 169
FAO
Food and Agriculture Organization of the United Nations
Roma - Viale Terme di Caracalla
ICE
Istituto Commercio Estero
Roma - Via Liszt, 21
INEMO
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Roma - Piazza Della Rovere, 104
SCAU
Servizio Contributi Agricoli Unificati
Roma - Via Barberini, 67
Società Agricola Forestale per le Piante da Cellulosa e Carta
Roma - Via dei Crociferi, 19
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Istituto Nazionale Sociologia Rurale
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Collegio dei Periti Agrari
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Confederazione Nazionale Coltivatori Diretti
Roma - Via XXIV Maggio, 43

Confederazione Generale dell'Agricoltura
Roma - Corso Vittorio Emanuele, 101

CIA
Confederazione Italiana Agricoltori (ex Confcoltivatori)
Roma - Via Fortuny, 20

CGIL
Federbraccianti
Roma - Via L. Serra, 31

CISL
Unione Generale Coltivatori
Roma - Via Tevere, 20

Federpastori
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Roma - Via di Villa Sacchetti, 21
UNAPOL
Unione Nazionale Associazioni Produttori Olivicoli
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AIPO
Associazione Italiana Produttori Olivicoli
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Roma - Viale Campioni, 13

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L'agricoltura italiana conta 1994

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Adriana Poli Bortone
Ministro delle risorse agricole, alimentari e forestali

Il 1993 è stato un anno difficile per l'agricoltura italiana. Il settore ha risentito della congiuntura sfavorevole che ha interessato l'intera economia nazionale e di condizioni climatiche che hanno penalizzato le produzioni. Il 1993 è stato anche caratterizzato dal lungo iter di riforma sia del Ministero sia dei rapporti tra Stato e Regioni in materia di agricoltura, iter giunto a conclusione proprio sul finire dell'anno.

Gli ultimi mesi fanno intravedere dei segnali di ripresa di tali rapporti ed il nuovo assetto istituzionale appare più funzionale allo sviluppo di un sistema agro-industriale che riveste enorme importanza nell'economia nazionale.

L'efficace opuscolo informativo che l'INEA anche quest'anno ha predisposto, chiarisce, in maniera sintetica, organica ed inconfutabile che conta davvero un sistema agro-industriale che contribuisce per il 16% al prodotto interno lordo e che presenta, al suo interno, una componente agricola con una produzione finale che incide per il 19% su quella complessiva comunitaria, seconda solo a quella francese.

Nei nuovi scenari di sviluppo che si vanno definendo per il Paese, il sistema produttivo agro-industriale dovrà avere, pertanto, una collocazione ed una attenzione di rilievo; spetterà però alle istituzioni agricole, ciascuno per il ruolo che ricopre ma con un'azione coordinata, predisporre quadri di riferimento organici e misure d'intervento che sappiano cogliere le istanze degli operatori del settore e valorizzare al meglio le risorse che, a livello comunitario e nazionale, vengono destinate allo sviluppo del settore primario.

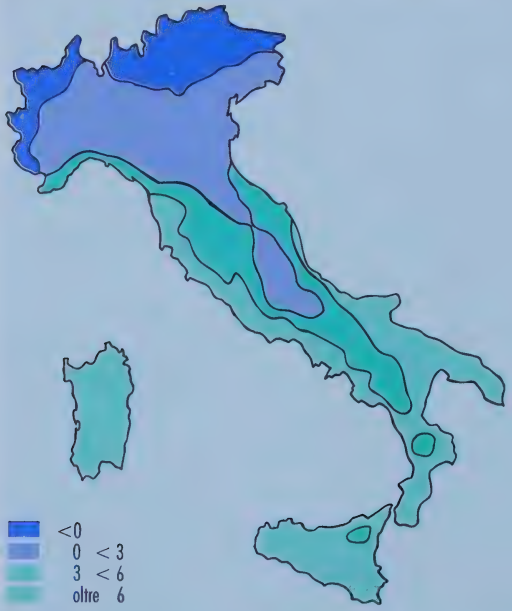
Tutti i dati statistici contenuti nel testo,
salvo diverse indicazioni, sono di fonte ISTAT e INEA.
Per i confronti internazionali
sono state utilizzate fonti EUROSTAT.

I dati dell'opuscolo sono consultabili su VIDEOTEL a pag. 2788
È consentita la riproduzione citando la fonte

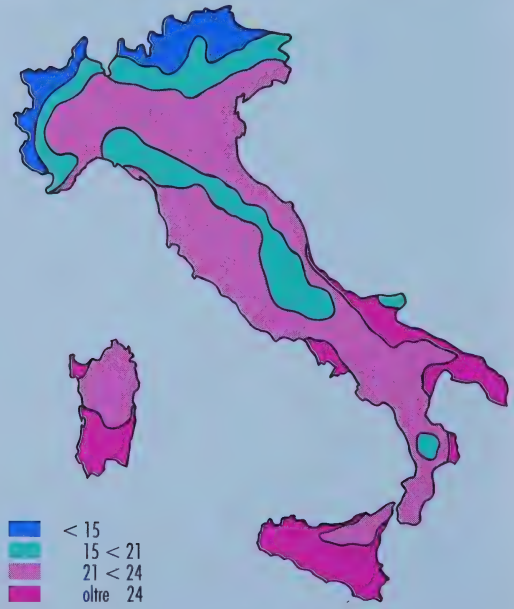
ECOSISTEMA

Clima*

Temperatura media (°C) del mese più freddo (Gennaio)



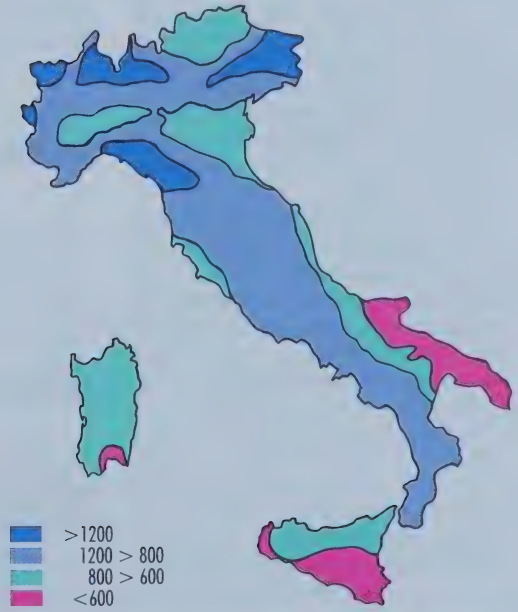
Temperatura media (°C)del mese più caldo (Luglio)



** Valori delle medie trentennali Fonte ed elaborazione: SIAN-UCEA Roma*

Ore di sole in un anno

Precipitazioni (mm) totali in un anno



Territorio, Popolazione ed Economia

Caratteri Generali

Il territorio italiano è composto prevalentemente da terreni collinari e montani. Su circa 30 milioni di ettari di superficie territoriale solo il 23% è rappresentato dalla pianura, che nel Mezzogiorno è pari al 18% e nel Centro al 9%.

Nel corso degli ultimi anni lo sviluppo demografico è stato sostenuto pressochè completamente dalle immigrazioni dall'estero, mentre la popolazione italiana ha presentato una crescita naturale sempre più contenuta o addirittura nulla.

Territorio e popolazione

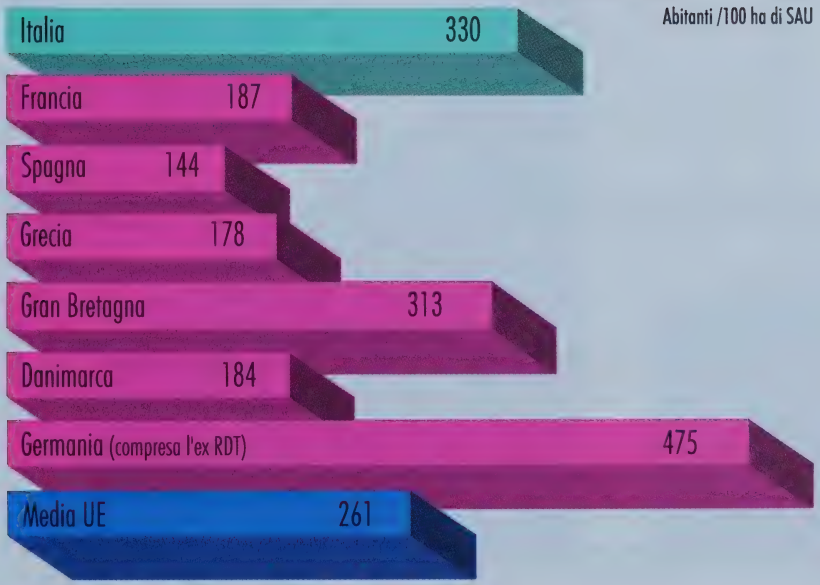
Circoscrizioni	Superficie territoriale km^2	Superficie *(1)* agraria %	Popolazione *(2)* 000 unità	Densità ab./km^2	Forze lavoro *(3)* 000 unità
Nord	119.880	43,4	25.433	212	11.059
Centro	58.369	46,4	10.973	188	4.492
Sud	123.054	58,0	20.748	169	7.236
ITALIA	301.303	49,9	57.154	190	22.787

Territorio per zona altimetrica

Zone	Nord	Centro	Sud	Italia
Montagna	5.530	1.578	3.503	10.611
Collina	2.272	3.724	6.548	12.544
Pianura	4.185	535	2.255	6.975
TOTALE	11.987	5.837	12.306	30.130

(1) Percentuale territorio con seminativi, orti familiari, colture arboree, prati permanenti e pascoli, castagneti da frutto. Fonte: Censimento agricoltura 1990
(2) Popolazione residente al 31-12-93, dati provvisori comprensivi dei recuperi postcensuari
(3) Dati non confrontabili con il 1992, per innovazioni introdotte nell'indagine ISTAT sulle forze di lavoro

Rapporto popolazione / superficie agricola



Superficie agricola e disponibilità di territorio

Il processo di urbanizzazione erode progressivamente il territorio italiano. La superficie improduttiva, imputabile alla diffusione degli insediamenti o delle infrastrutture, tende ad aumentare: attualmente essa è valutata in circa 2,8 milioni di ettari, pari al 9% del territorio nazionale.
La superficie agricola, viceversa, è in continua diminuzione: dal 1970 al 1990 la SAU è calata di oltre 2,4 milioni di ettari (-14%) secondo i dati censuari. Questo fenomeno interessa tutti i Paesi sviluppati ed in via di industrializzazione. La risorsa terra diviene, pertanto, un bene sempre più prezioso, specie in quei paesi come l' Italia, ove la pressione antropica è elevata e la conformazione morfologica del territorio presenta accentuati dislivelli.

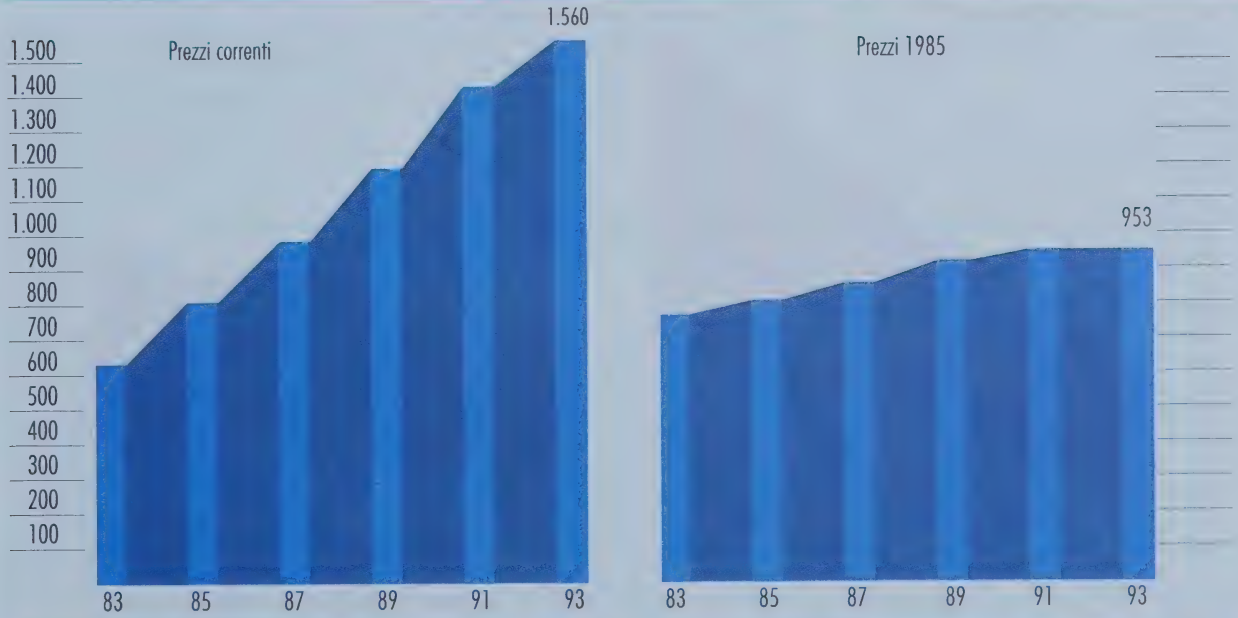
Utilizzazione del territorio in Italia e nei Paesi della UE (%)

Voci	Italia	(*) Altri paesi mediterranei	(**) Altri UE	Totale UE
Terre arabili *(1)*	29,5	29,4	31,1	30,4
Colture permanenti *(2)*	11,0	9,5	1,3	5,1
Orti familiari	0,3	-	0,2	0,2
Prati e pascoli permanenti	16,2	12,4	26,5	20,9
Boschi	21,4	29,1	21,9	24,1
Acque interne	2,4	1,2	1,7	1,7
Superficie improduttiva e altri terreni *(3)*	19,2	18,4	17,2	18,2
SUPERFICIE TOTALE (000 ha)	30.131	72.878	133.811	236.820

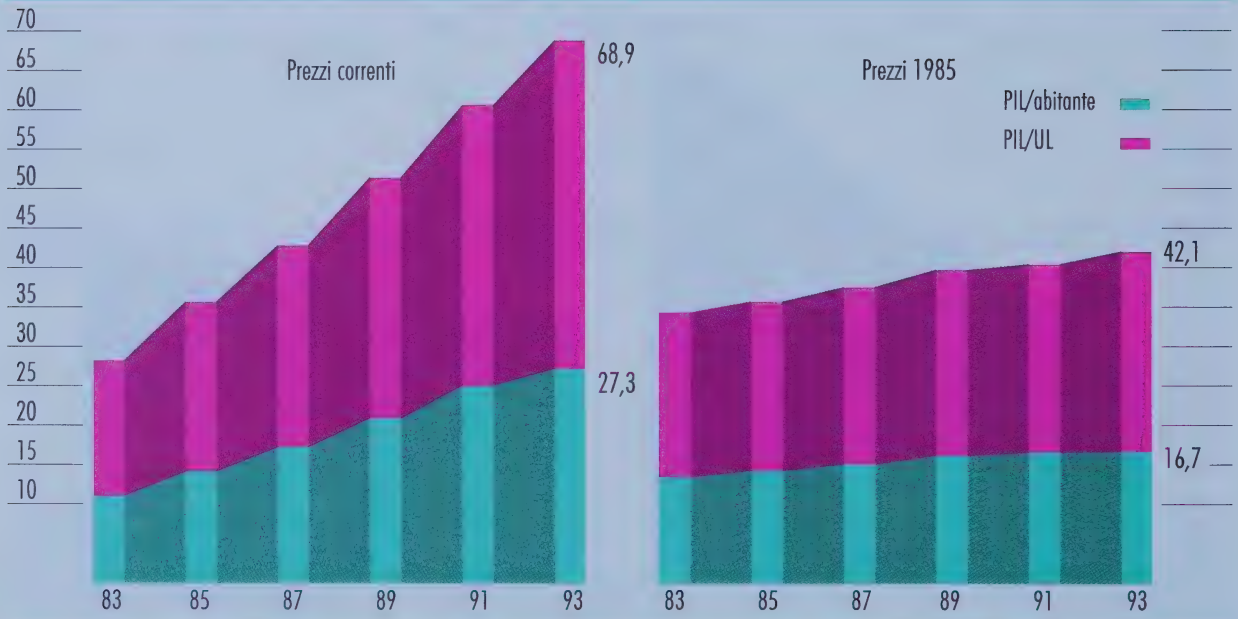
(*) Grecia, Spagna e Portogallo
(**) Francia, Germania inclusa la ex RDT, Benelux, Danimarca, Irlanda, Gran Bretagna
(1) Seminativi, incluse le coltivazioni foraggere temporanee ed i terreni a riposo
(2) Coltivazioni legnose agrarie e altre coltivazioni permanenti
(3) Insediamenti civili ed industriali, infrastrutture, rocce e terreni sterili; negli altri terreni rientrano le aree abbandonate, gli incolti, i parchi e giardini ornamentali, le aree delle aziende agricole occupate da fabbricati, cortili, strade poderali, tare delle coltivazioni
Fonte: CEE - La situazione dell'agricoltura nella Comunità - Relazione 1992

Prodotto Interno Lordo

Andamento del PIL dal 1983 al 1993 (000 mrd. £)



Andamento del PIL dal 1983 al 1993 per abitante e per UL



Agricoltura e Ambiente

Politica Comunitaria

Affrontare il rapporto tra agricoltura ed ambiente in Italia vuol dire soprattutto parlare dello sviluppo della politica ambientale della UE . Quest'ultima ha avuto notevole impulso negli ultimi anni, in particolare a partire dall'aggiunta del Titolo Ambiente all'Atto Unico Europeo del 1986, nel quale si sancisce la necessità di un'azione comune per la salvaguardia ambientale.

Già i precedenti tre Programmi di Azione Ambientale (1973-76, 1977-81, 1982-86) contengono alcune linee guida per la politica ambientale della UE che conservano ancora una validità, tuttavia è proprio l'Atto Unico che pone le basi giuridiche per gli interventi ambientali fornendo un quadro di riferimento per le azioni unilaterali di vario tipo.

Elemento importante del nuovo Trattato è l'obbligo di considerare la tutela ambientale come componente essenziale di tutte le altre politiche UE , in un approccio integrato reso ancora più evidente nel Quarto (1987-92) e nel Quinto Programma di Azione Ambientale (adottato nel '93).

Per quanto riguarda in particolare il settore agricolo, nonostante vari interventi comunitari specifici per l'ambiente si registrino negli anni '70 ed '80, è il reg. CEE 797/85 il primo atto legislativo che vincola i provvedimenti di politica agraria alla tutela ambientale, avendo tra gli obiettivi primari il contenimento delle eccedenze agricole.

In seguito hanno origine tutta una serie di interventi che rispondono ad obiettivi più generali di politica agraria ma che risultano a favore della tutela ambientale, tramite incentivi ad attività agricole a basso impatto, riconversione ed estensivizzazione produttiva, set-aside.

Tra questi vanno ricordate le misure di tipo strutturale e territoriale, quali i regg. 2052/88, 4253/88 e 2328/91.

Diretta influenza sull'agricoltura presenta invece il reg. 2092/91, modificato successivamente dal 2083/92, relativo al metodo di produzione biologico dei prodotti agricoli.

Esso, pur non prevedendo alcun intervento finanziario, riconosce il ruolo dell'agricoltura biologica nella tutela ambientale e nella conservazione dello spazio rurale, definendo un quadro normativo relativamente alla produzione e commercializzazione di tali prodotti.

È nell'ambito delle recenti misure di accompagnamento alla riforma della PAC che, con il reg. 2078/92, viene istituito un regime diretto di aiuti agli agricoltori che introducono o mantengono metodi di produzione

agricola compatibile con le esigenze di protezione dell'ambiente e di cura dello spazio naturale.
L'attivazione delle misure è prevista per tutto il territorio nazionale sulla base di programmi zonali pluriennali che le amministrazioni locali devono predisporre secondo le linee guida contenute in una Circolare del Ministero dell'Agricoltura e Foreste del 1 febbraio 1993, n. 4.
Tra le altre recenti iniziative comunitarie che interessano più o meno direttamente il settore primario si segnalano:

- *il reg. 2080/92 che istituisce un regime comunitario di aiuti alle misure forestali nel settore agricolo. I premi previsti e gli incentivi agli investimenti forestali si pongono il duplice obiettivo di difesa dell'ambiente e di contenimento delle produzioni agricole;*
- *il reg. 1973/92 che istituisce uno strumento finanziario per l'ambiente (LIFE). Esso prevede lo stanziamento di 400 milioni di ECU per il periodo 1991-95 per tutte le azioni che contribuiscono allo sviluppo e all'applicazione della legislazione e politica comunitaria in materia ambientale, nel rispetto del principio inquinatore-pagatore e di quello della sussidiarietà;*
- *la direttiva 43/92 relativa alla conservazione degli habitat naturali e seminaturali e della flora e della fauna selvatiche. Obiettivo principale della direttiva è quello di salvaguardia della biodiversità.*

A tal fine vengono individuate zone speciali di conservazione che vanno a costituire una rete ecologica europea (Natura 2000).

Aree Protette

I parchi nazionali già realizzati in Italia sono cinque:

- *Gran Paradiso 70.000 ha*
- *Stelvio 134.620 ha*
- *Abruzzo 40.000 ha*
- *Circeo 8.400 ha*
- *Calabria 15.435 ha*

Con la legge finanziaria 1988 sono stati istituiti i seguenti parchi nazionali:

- *Dolomiti Bellunesi 25.000 ha*
- *Monti Sibillini 75.000 ha*
- *Pollino 176.000 ha*
- *Parco marino Golfo di Orosei 220 kmq*

Il Piano triennale di salvaguardia del Ministero dell'Ambiente prevede l'istituzione del Parco Nazionale dell'Aspromonte (99.000 ha) e di parchi interregionali quali:

- *Delta del Po (1.000 kmq)*
- *Foreste Casentinesi (17.650 ha)*
- *Arcipelago Toscano (2.500 ha terrestri e 65 ha marini)*

Con la legge quadro n. 394/91 sono stati istituiti i seguenti Parchi Naturali:

- *Gran Sasso*
- *Monti della Laga*
- *Gargano*
- *Vesuvio*
- *Maiella*
- *Cilento e Vallo di Diano*

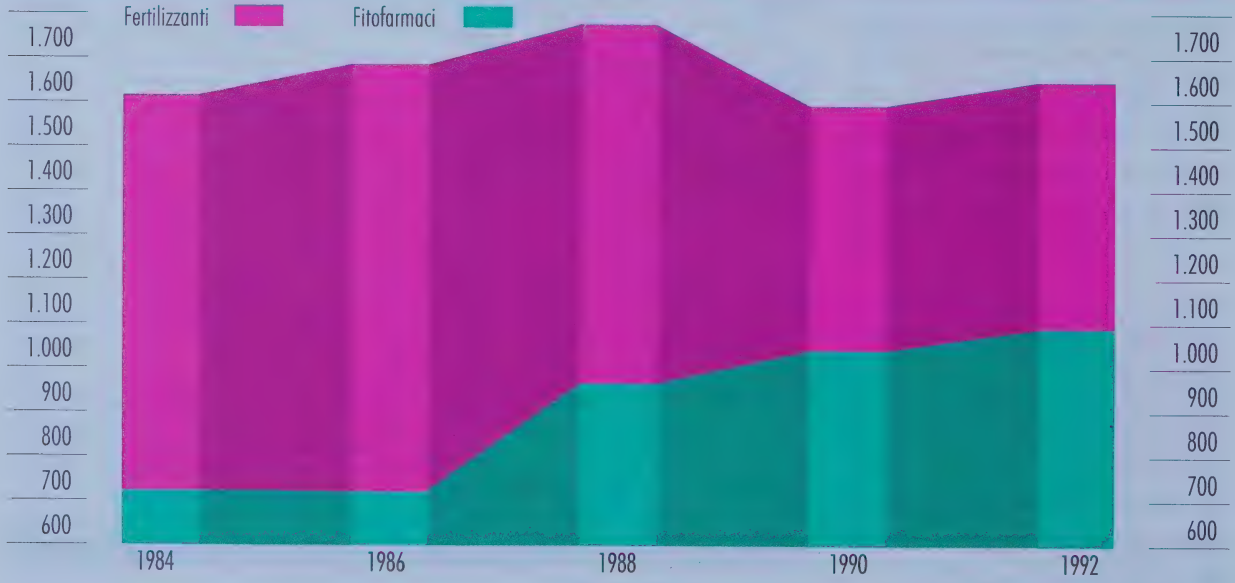
Aree protette statali e regionali in Italia - Ottobre 1991

Regioni	Aree protette (Sup. in ha)			% sulla
	Regionali	Statali	In complesso	sup. regionale
Pimonte	121.729	45.473	167.202	6,19
Valle d'Aosta	3.521	37.500	41.021	12,57
Lombardia	397.893	65.995	463.888	19,45
Bolzano	114.966	53.447	168.413	16,38
Trento	82.472	19.386	101.858	4,30
Veneto	36.750	57.593	94.343	4,30
Friuli V.G.	43.130	2.042	45.172	5,76
Liguria	62.367	16	62.383	11,53
Emilia Romagna	111.289	48.423	159.712	6,96
Toscana	91.800	100.605	192.405	5,45
Umbria	-	17.957	17.957	2,13
Marche	6.000	56.594	62.594	6,46
Lazio	79.567	22.099	101.666	5,54
Abruzzo	38.738	50.559	89.297	8,15
Molise	-	5.656	5.656	1,26
Campania	220	1.978	2.198	0,16
Puglia	424	14.346	14.770	0,54
Basilicata	81.577	94.461	176.038	17,29
Calabria	3.000	131.931	134.931	7,11
Sicilia	116.648	1.706	118.354	4,18
Sardegna	-	14.147	14.147	0,59
ITALIA	1.392.091	841.914	2.234.005	8,10

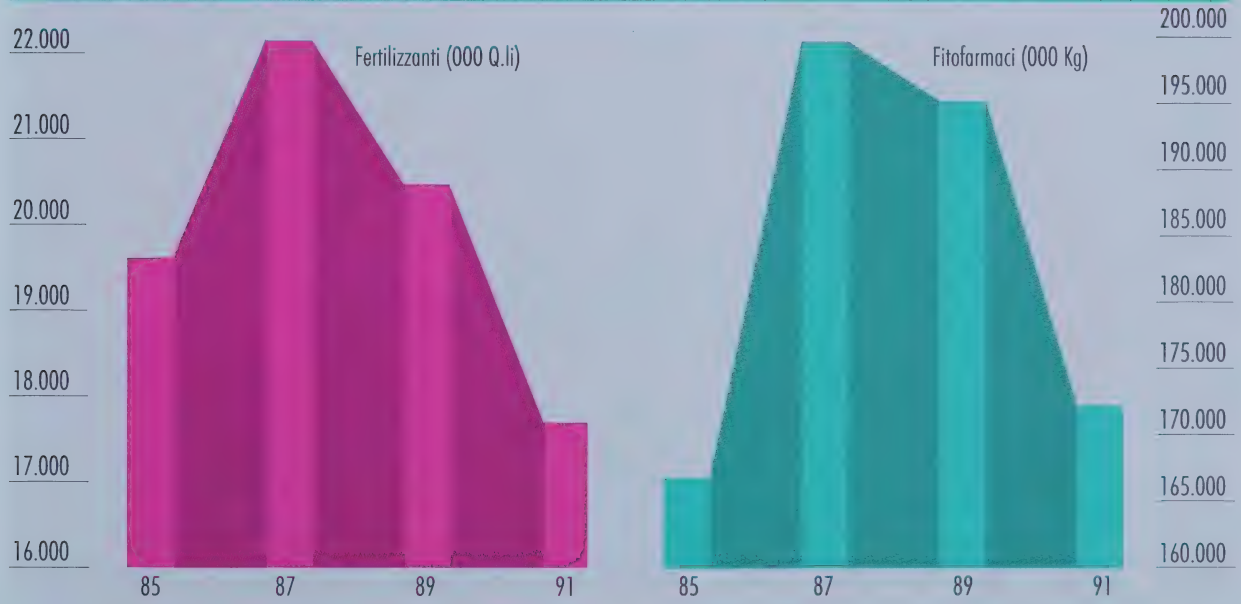
Fonte: Elaborazione Ministero dell'Ambiente, 1992

Uso dei Prodotti Chimici in Agricoltura

Consumi di fertilizzanti e fitofarmaci (miliardi di £)



Elementi fertilizzanti nei concimi chimici e fitofarmaci distribuiti al consumo



Uso dei fertilizzanti e dei fitofarmaci per regione nel 1991 (distribuzione al consumo)

Regioni	*(1)* Fertilizzanti	Variaz. % 1991/85	*(2)* Fitofarmaci	Variaz. % 1991/85
Valle d'Aosta	3	50,0	64	36,1
Piemonte	1.713	-10,8	13.833	-20,8
Lombardia	2.562	14,2	13.563	-2,5
Trentino A.A.	142	-19,3	4.768	0,4
Veneto	2.191	-14,8	20.577	10,8
Friuli V.G.	646	-11,3	4.037	21,1
Liguria	30	-16,6	3.084	41,6
Emilia Romagna	2.269	4,6	27.997	25,6
Toscana	925	-14,8	6.612	-12,0
Umbria	431	-4,4	2.938	24,6
Marche	747	-8,5	4.860	-1,6
Lazio	883	-2,1	10.778	8,3
Abruzzi	715	54,4	4.007	-10,5
Molise	163	-12,3	779	6,4
Campania	693	-26,0	12.397	-16,0
Puglia	1.473	-6,5	16.048	-3,1
Basilicata	284	-30,2	2.329	55,0
Calabria	390	-10,7	3.933	-5,0
Sicilia	1.044	-20,4	16.461	11,3
Sardegna	393	-10,6	3.248	25,5
ITALIA	17.697	-9,7	172.313	3,2

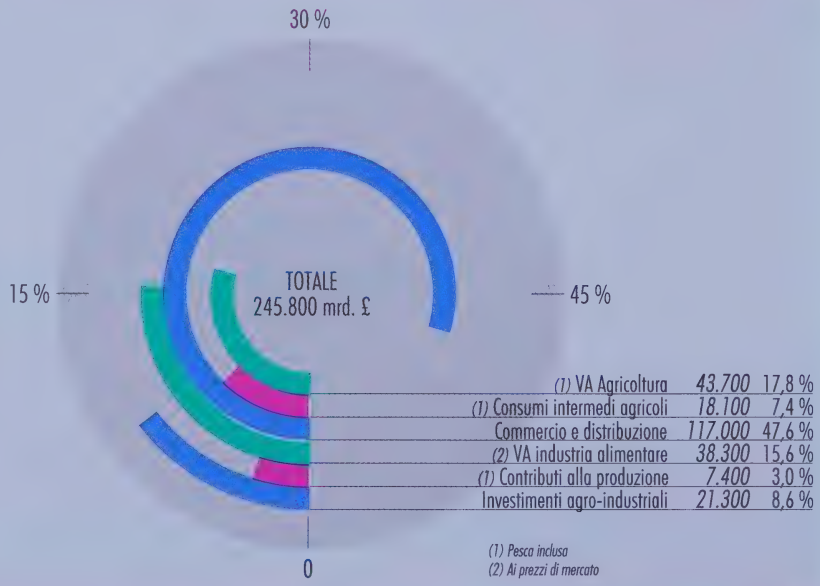
(1) in 000 di q.li (2) in 000 kg

SISTEMA AGRO-INDUSTRIALE

Componenti

Il sistema agro-industriale costituisce un complesso di attività dove l'agricoltura interagisce con tutti i settori collegati: produzione di mezzi tecnici (fertilizzanti, antiparassitari, mangimi, energie, ecc.), industria alimentare e ristorazione collettiva.
Per il 1993 il complesso agro-alimentare viene stimato in circa 245.800 miliardi di lire, pari a circa il 16% del PIL. Le principali componenti sono rappresentate da: 43.700 del Valore Aggiunto (VA) agricolo, 18.100 dei consumi intermedi agricoli, 21.300 dagli investimenti agro-industriali, 38.300 come VA dell'industria alimentare, 117.000 della commercializzazione e dalla distribuzione.
Da tali stime sono escluse le attività ed i servizi pubblici che pure confluiscono nel sistema in maniera consistente.

Principali Componenti



(1) VA Agricoltura	43.700	17,8 %
(1) Consumi intermedi agricoli	18.100	7,4 %
Commercio e distribuzione	117.000	47,6 %
(2) VA industria alimentare	38.300	15,6 %
(1) Contributi alla produzione	7.400	3,0 %
Investimenti agro-industriali	21.300	8,6 %

(1) Pesca inclusa
(2) Ai prezzi di mercato

FATTORI DELLA PRODUZIONE

Consumi Intermedi
Investimenti
Credito Agrario
Meccanizzazione
Occupazione

Consumi Intermedi

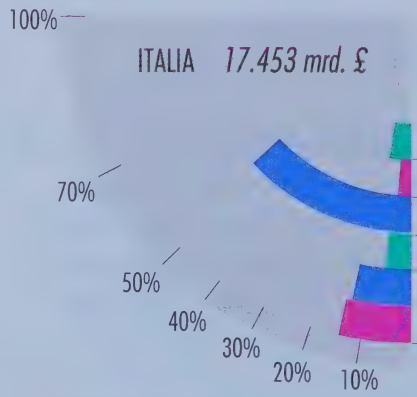
Nel 1993 la spesa per consumi intermedi è aumentata, in valore, di oltre il 5% rispetto al 1992. Questo è il risultato di due tendenze contrapposte: da un lato il sensibile incremento dei prezzi (in media il 6,6%), dall'altro la diminuzione delle quantità impiegate (-1,2%).

I mezzi per le colture vegetali sono ancora diminuiti in quantità (-2,2%), ed in particolare gli antiparassitari, i concimi (-1,7%) e le sementi (-2,9%). Questi effetti sono stati prodotti da: la limitazione degli impieghi (per contenere i costi) da parte degli agricoltori; l'adozione, in seguito alla riforma della PAC, dei regimi di set-aside; l'uso di pratiche agronomiche ecocompatibili.

Nel settore zootecnico è diminuito il consumo dei mangimi (-2,3%) soprattutto da parte degli allevamenti da latte. Anche la voce relativa ai servizi risulta in calo (-2,5%) per il secondo anno consecutivo.

È aumentato il consumo di energia motrice (4,4%) nonostante l'incremento medio dei prezzi (20,5%) che hanno risentito del deprezzamento della lira e della riduzione delle agevolazioni fiscali accordate nel passato ai prodotti petroliferi.

Principali categorie di consumi intermedi agricoli



Concimi	1.685	9,7 %
Sementi	815	4,7 %
(1) Mangimi	9.102	52,2 %
Antiparassitari	1.122	6,4 %
Altri beni e servizi	2.259	12,9 %
Energia	2.470	14,1 %

(1) incluse altre spese per il bestiame

Andamento degli investimenti agricoli (*)

	Valori correnti mrd. £	Valori costanti prezzi 1985 mrd. £	% su totale investimenti fissi lordi (1)	Investimenti agricoli su VA agricolo (1) %
1980	7.465	13.929	7,9	36,3
1981	8.646	13.319	7,8	34,9
1982	9.229	12.389	7,6	33,0
1983	10.537	12.643	7,9	30,9
1984	11.582	12.657	7,6	32,6
1985	12.234	12.233	7,3	31,2
1986	13.103	12.410	7,2	31,2
1987	13.611	12.225	6,8	29,5
1988	16.117	13.666	7,1	34,0
1989	16.397	13.062	6,5	32,1
1990	16.180	12.041	5,8	30,6
1991	16.456	11.403	5,3	26,8
1992	16.232	10.767	5,2	25,0
1993	16.252	10.318	5,6	24,7

(*) Inclusi silvicoltura e pesca
(1) A prezzi 1985

Nel 1993 gli investimenti agricoli sono diminuiti di oltre il 4%, in termini reali, proseguendo nella tendenza flessiva che si registra ormai da circa un quinquennio.
È diminuita la domanda di macchine agricole e di altre attrezzature (-10%), nonchè delle opere di miglioramento fondiario (-7%).
Sono aumentati, viceversa, gli investimenti in fabbricati non residenziali (11%).
La quota degli investimenti agricoli sul totale è leggermente aumentata rispetto al 1992 in conseguenza della forte caduta che si è registrata per il sistema economico nel suo complesso (-11%); l'incidenza sul valore aggiunto agricolo è ulteriormente diminuita, segno dell'accentuarsi della carenza di capitali nel settore.

Credito Agrario

Nel 1993 il credito agrario ha risentito della diminuzione delle agevolazioni pubbliche e della flessione della produzione agricola.
Le erogazioni per i prestiti di esercizio si sono ridotte di oltre il 5%; l'incidenza dell'agevolato è leggermente cresciuta rispetto al 1992.

Il 76% del credito di esercizio è stato assorbito dalla conduzione, il 9% dai prestiti ad enti e associazioni agrarie, il 7% da bestiame e macchine. Il credito agrario di miglioramento ha presentato una crescita inferiore alla dinamica inflazionistica (1%) con un consistente aumento della quota dell'agevolato.
Il 17% delle erogazioni è stato assorbito dalle costruzioni rurali, dalle piantagioni e dalle irrigazioni; il 6% dalla formazione della proprietà coltivatrice, il 9% dai finanziamenti all'agro-industria; il 10% dalle infrastrutture.

Erogazioni

Tipo di credito	1992		1993	
	mrd. £	% agevolato sul totale	mrd. £	% agevolato sul totale
Credito di esercizio	14.876	46,1	14.058	46,6
Credito di miglioramento	1.761	44,3	1.780	53,2
TOTALE	16.637	45,9	15.838	47,4

Livelli di indebitamento dell'agricoltura

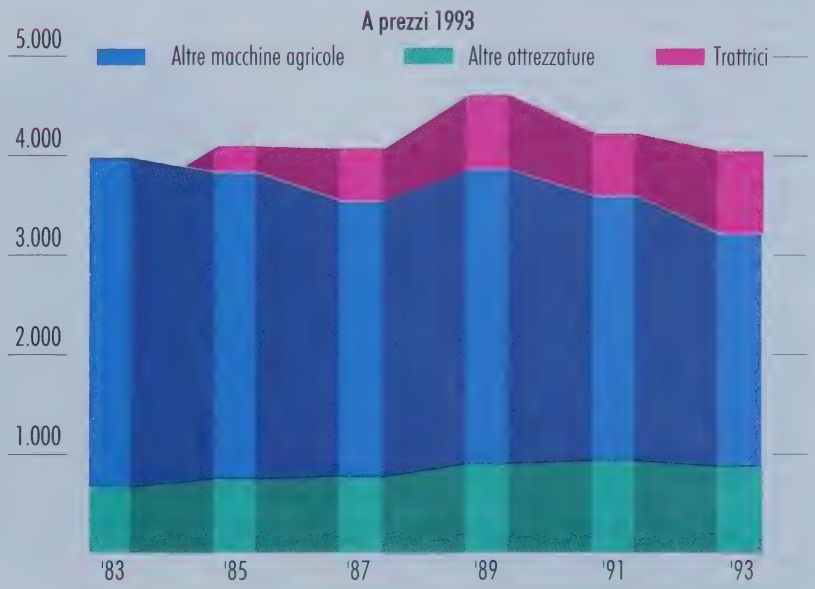
	1988	1989	1990	1991	1992	1993
Consistenza credito agrario *(mrd. £)*	25.466	27.153	27.653	27.862	27.111	26.661
% sulla PLV	49,1	49,6	49,5	44,9	44,8	45,2

Fonte: Elaborazione su dati BANCA d'ITALIA

Investimenti in macchine ed attrezzature (mrd. £)

A prezzi correnti

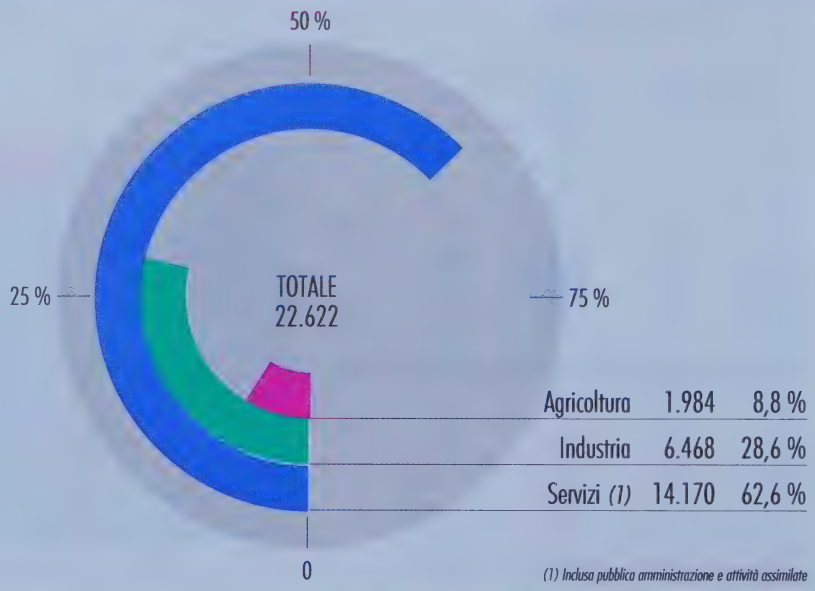
	Trattrici	Altre macchine	Altre attrezzature
1983	2.027	2.064	443
1984	2.326	2.262	517
1985	2.653	2.428	584
1986	2.786	2.575	645
1987	2.979	2.598	637
1988	3.475	2.949	741
1989	3.717	3.208	818
1990	3.672	3.237	852
1991	3.684	3.341	886
1992	4.123	3.422	923
1993	4.048	3.213	880



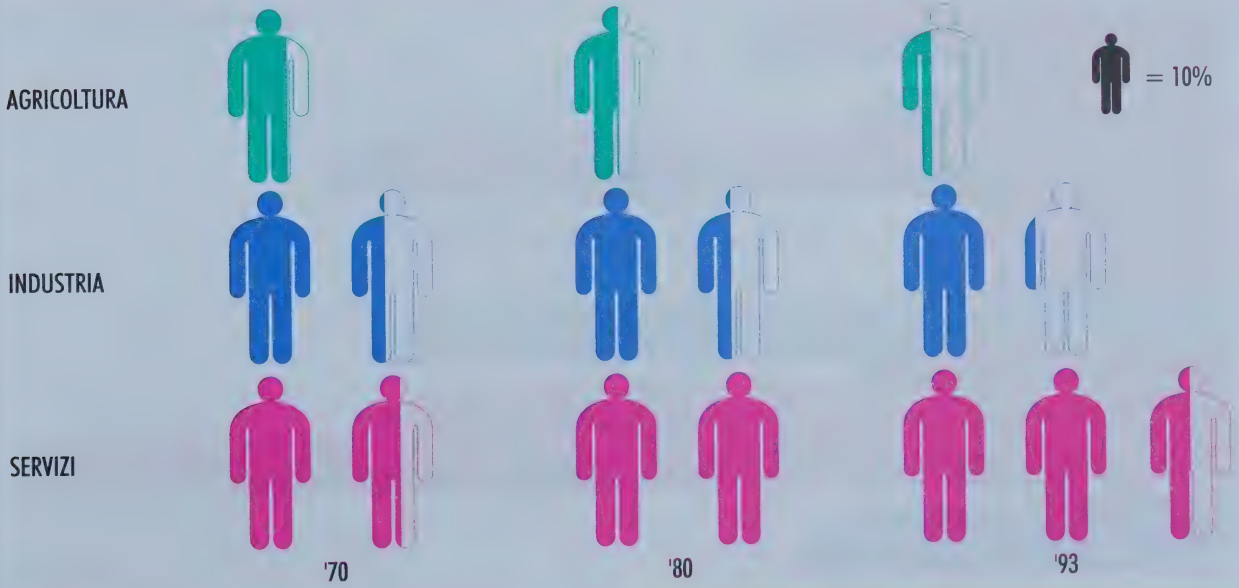
Occupazione

Nel 1993 il numero degli occupati ha subito un ulteriore e più consistente calo, dopo quello del 1992.
La domanda di lavoro è diminuita in tutti i principali settori: agricoltura (-6,9%), industria (-4,1%), servizi di mercato (-2,2%).
Stazionario (-0,2) il numero degli occupati nella pubblica amministrazione ed attività assimilate.
La flessione ha interessato tutti i lavoratori (-3,4% gli indipendenti, -2,6% i dipendenti); in agricoltura i più colpiti sono stati i dipendenti, diminuiti dell' 8,6% contro il calo del 6,1% subito dagli indipendenti.
L'incidenza dei lavoratori dipendenti sul totale è scesa, pertanto, dal 33,6% del 1992 al 33% del 1993.
Il rapporto tra lavoro agricolo e popolazione nazionale è in continuo mutamento: nel '70 per ogni unità di lavoro agricolo vi erano 14 abitanti, diventati 19 nel 1980 e 29 nel '93.

UL per settori (000 unità)



UL / popolazione in %



Volume di lavoro agricolo nell'UE

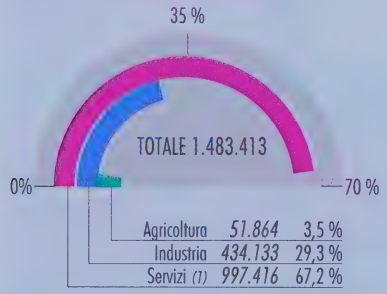
SETTORE AGRICOLO

Valore Aggiunto
Produttività
Risultati Produttivi
Prezzi e Costi
PLV e Reddito Agricolo

Valore Aggiunto

Nel 1993 il VA al costo dei fattori del settore primario è diminuito, rispetto al 1992, dell'1,7% in valori correnti dopo due anni di crescita.
Il contributo dell'agricoltura alla formazione del VA dell'economia italiana è sceso al 3,5%. L'incidenza del VA agricolo al costo dei fattori sul totale nazionale (a prezzi costanti) è calata dall'8,1% del 1970 al 6,2% del 1980 fino ad arrivare al 3,4% nel 1993. Contemporaneamente la quota dei servizi ha superato il 60% del VA totale; mentre quella dell'industria ha presentato negli anni più recenti segni di arretramento.
La quota del settore agricolo in Italia risulta ancora superiore a quella di altri Paesi industrializzati, soprattutto in termini di occupazione, ma la tendenza è quella di un avvicinamento alle posizioni delle altre nazioni dell'Europa Centro-Settentrionale.

Va per settori (mrd. £)



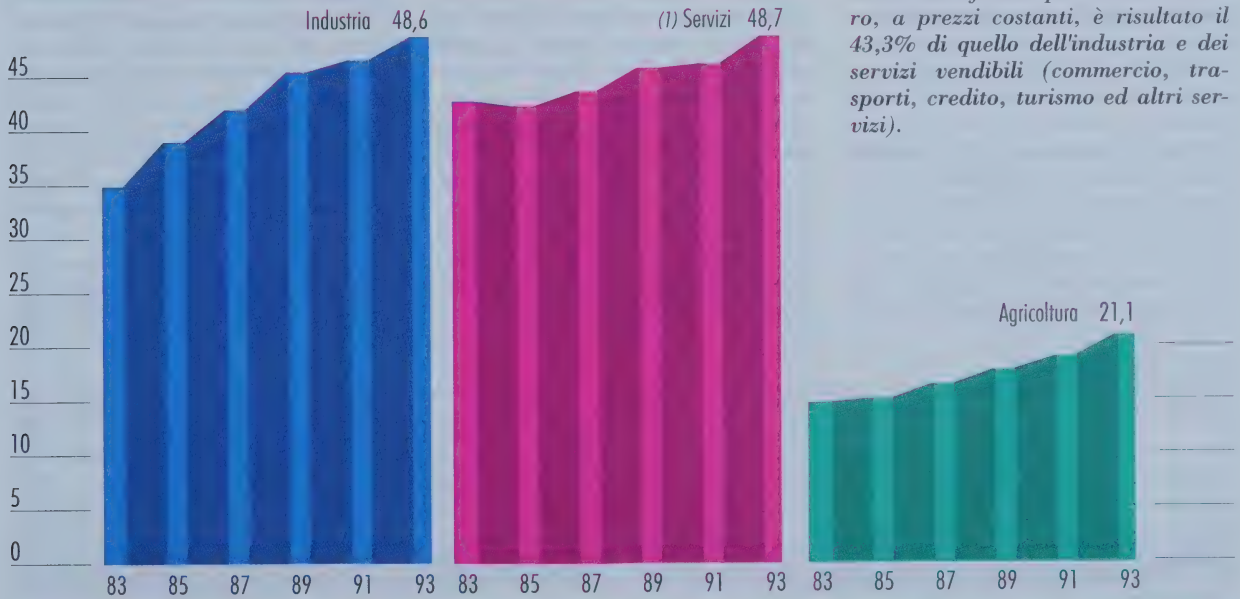
(1) Inclusa la pubblica Amministrazione e Servizi Ausiliari

Incidenza dell'agricoltura sul totale dell'economia

Paesi	(*) Valore aggiunto %	(*) Occupati %
Italia	3,4	8,5
Francia	3,7	5,4
Spagna	4,8	10,7
Grecia	15,7	21,6
Germania (1)	1,6	3,4
Olanda	4,7	4,5
Regno Unito	1,2	2,2
UE	2,9	6,2
USA (2)	2,4	2,9
Giappone (2)	2,3	6,7

(*) Il dato di fonte EUROSTAT è riferito al 1990 per il VA e al 1991 per gli occupati
(1) Esclusa la Germania RTD. (2) Fonte: EUROSTAT 1990

VA / UL per settore a prezzi 1985 (milioni di £)



Nel 1993 il valore aggiunto agricolo al costo dei fattori per unità di lavoro, a prezzi costanti, è risultato il 43,3% di quello dell'industria e dei servizi vendibili (commercio, trasporti, credito, turismo ed altri servizi).

(1) Esclusa pubblica amministrazione ed attività assimilate

Risultati Produttivi

Nel '93 la produzione vendibile agricola (PLV) è diminuita del 2,7%, in quantità, dopo due anni di crescita.
L'andamento climatico non è stato favorevole: le forti piogge primaverili ed autunnali ed una estate molto siccitosa hanno danneggiato le colture.Nel comparto delle produzioni erbacee si è registrata una sensibile contrazione (-5,2%); sono diminuite anche le coltivazioni arboree (-3,3%), mentre per le produzioni zootecniche si è rilevata una sostanziale stabilità. Considerando i singoli settori, i risultati sono stati alquanto differenziati: i cereali hanno registrato nel complesso un leggero incremento delle quantità prodotte (1%), in conseguenza del notevole ampliamento delle superfici investite a mais ibrido; le orticole hanno presentato una contrazione (-3,7%) che ha interessato la maggior parte dei prodotti ed in particolare patate, carciofi e pomodori.
Le coltivazioni industriali hanno subito una forte flessione (-22,7%), soprattutto la soia (-45%).
Quest'ultima ha risentito del nuovo regime di aiuti che premia solo le colture di primo raccolto, escludendo quelle in secondo. Per il florovivaismo si è registrata una sensibile diminuzione delle quantità prodotte, (10%). Nel comparto delle colture arboree i prodotti della viticoltura sono diminuiti dell'8,7%, quelli della frutticoltura dell'11,9% e gli agrumi del 7,1%.
Il settore vitivinicolo ha risentito della applicazione della disciplina comunitaria in materia di distillazione

PLV per comparti

Comparti	Nord		Centro		Sud		Italia	
	mrd. £	%	mrd. £	%	mrd. £	%	mrd. £	%
Erbacee *(1)*	8.873	29,4	3.523	42,7	8.312	38,6	20.708	34,5
Arboree	4.787	15,8	1.776	21,5	8.374	38,8	14.937	24,9
Zootecnia	16.151	53,4	2.744	33,3	4.715	21,9	23.610	39,3
Silvicoltura	424	1,4	205	2,5	157	0,7	786	1,3
TOTALE	30.235	100,0	8.248	100,0	21.558	100,0	60.041	100,0

(1) incluse le foraggere

obbligatoria e della progressiva riduzione dei consumi di vino. Le produzioni frutticole sono state penalizzate dalle cattive condizioni climatiche, che hanno interessato soprattutto i raccolti di pesche, nettarine, mele e pere.

Nell'ambito delle produzioni zootecniche si è registrata una leggera crescita per le carni (1%), da attribuire soprattutto a quelle bovine (2,3%); sono diminuite anche le ovicaprine e le avicole. È diminuita la produzione di latte vaccino, mentre è aumentata quella di latte ovica-

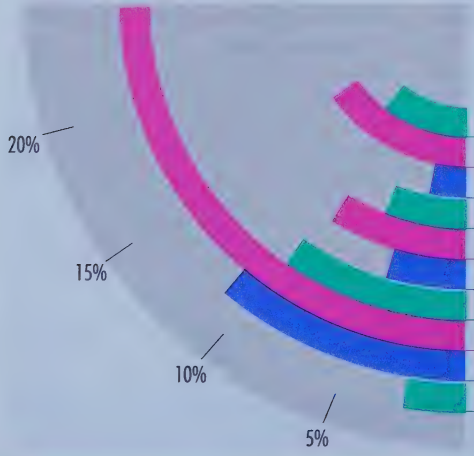
Produzione agricola nei Paesi dell'Unione Europea nel 1992

Paesi	Produzione finale *(1)* *(*)* Milioni ECU	%	Produzione vegetale *(*)* Milioni ECU	%	Produzione zootecnica *(*)* Milioni ECU	%
Italia	37.793	19,1	23.214	24,3	14.206	14,1
Belgio	6.559	3,3	2.298	2,4	4.244	4,2
Danimarca	6.459	3,3	1.773	1,9	4.686	4,6
Germania	26.722	13,5	9.544	10,0	17.148	17,0
Grecia	8.616	4,4	6.041	6,3	2.573	2,6
Spagna	23.840	12,1	13.621	14,3	9.803	9,7
Francia	44.905	22,7	23.033	24,1	21.897	21,7
Irlanda	4.420	2,3	609	0,6	3.811	3,8
Lussemburgo	189	0,1	43	..	146	0,2
Olanda	16.012	8,1	6.638	6,9	9.374	9,3
Portogallo	3.577	1,8	1.498	1,6	1.951	1,9
Regno Unito	18.471	9,3	7.288	7,6	11.024	10,9
UE 12	197.563	100,0	95.600	100,0	100.863	100,0

(*) Tasso di conversione 1 ECU = 1.595 Lire circa al 1992 (1) Inclusi i lavori agricoli per conto terzi per nuove piantagioni ed aggiustamenti nelle stime Fonte: EUROSTAT - COMPTES ECONOMIQUES DE L'AGRICULTURE ET DA LA SYLVICULTURE - 1987-1992

prino. La produzione di uova è rimasta stazionaria.
Sono diminuite le produzioni zootecniche minori, tra le quali quella del miele (-4%).
Nel comparto della silvicoltura le quantità prodotte sono rimaste pressochè stazionarie rispetto ai livelli del 1992.

PLV agricola per principali settori



	mrd £	%
TOTALE	*59.255*	*100,0*
(1) Cereali, foraggere e legumi secchi	*6.567*	11,1
(2) Ortaggi	*9.350*	15,8
(3) Colture industriali	*1.887*	3,2
Floro vivaismo	*3.667*	6,2
Vite	*5.379*	9,1
Olivo	*2.765*	4,7
Frutta e agrumi	*6.028*	10,1
Carne	*15.314*	25,8
Latte	*6.766*	11,4
Uova e altri	*1.532*	2,6

(1) Le foraggere ammontano a £ 156 mrd., i legumi secchi a £ 131 mrd. (2) Patate incluse
(3) Barbabietola da zucchero, tabacco, semi oleosi, fibre tessili e altri prodotti industriali

Principali produzioni vegetali e variazioni rispetto al 1992 (*)

Produzione	Superficie		Resa	Produzione raccolta		Produzione vendibile	
	000 ha	Var. %	q/ha	000 t.	Var. %	mrd. £	Var. %
Frumento tenero	889	-10,0	46,3	4.095	-11,2	1.309	-3,8
Frumento duro	1.514	-1,0	29,0	4.314	-0,3	1.608	5,8
Mais	937	9,8	86,3	8.050	8,9	2.043	15,4
Riso	231	6,8	54,8	1.284	-0,2	842	10,2
Barbabietola da zucchero	262	-11,6	422,9	10.847	-28,1	990	-18,0
Tabacco	65	-23,0	23,2	151	-22,0	593	-4,5
Soia	185	-45,5	33,0	585	-45,0	206	-31,1
Girasole	120	3,1	23,2	270	-2,9	82	20,6
Patata (primaticcia e comune)	94	-11,4	232,8	2.123	-11,6	716	-16,4
Pomodoro	115	-2,3	477,9	5.164	-5,6	1.152	-15,4
Vite (uva da tavola e comune)	992	-1,4	104,6	9.626	-9,4	-	-
Vino (000 hl)	-	-	-	62.227	-9,4	4.720	-17,4
Olive (oleificate e da consumo)	1.138	-0,2	28,3	3.077	30,1	-	-
Olio (000 q.li di spremitura)	-	-	-	5.791	33,3	2.602	28,1
Mele	79	-2,8	292,0	2.116	-11,6	1.081	-17,9
Pere	52	-0,4	204,0	880	-22,6	624	-20,1
Pesche e nettarine	112	-1,4	170,7	1.642	-13,2	1.188	-16,5
Arance	109	,	195,9	1.891	-10,5	868	16,3
Limoni	39	1,4	193,0	716	-4,0	566	-6,3
Mandarini e clementine	33	1,3	169,8	488	-2,1	292	-11,2
Actinidia	21	-	194,0	342	-8,7	379	-32,7

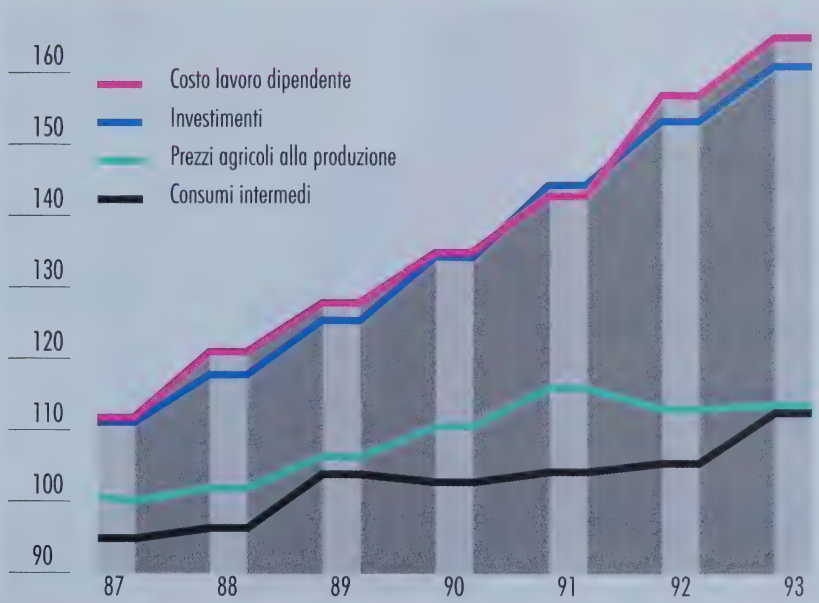
(*) Per il 1993 i dati sono provvisori

Principali produzioni zootecniche e variazioni rispetto al 1992

Allevamenti e prodotti	Consistenza		Produzione *(5)*		Prod. vendibile	
	000 capi	Var.%	000 t.	Var.%	mrd. £.	Var.%
Bovini *(1)*	7.514	-1,1	1.491	2,3	5.881	11,8
Suini	8050	-2,3	1.593	0,8	4.068	-5,0
Ovi-caprini	12.037	2,2	91	-3,2	431	4,2
Avicoli *(2)*	173.400	-	1.360	-0,6	3.524	11,9
Conigli e selvaggina			363	0,9	1.327	5,0
Uova *(3)*			11.926	0,3	1.478	7,1
Latte vaccino *(4)*			9.704	-1,9	6.056	0,4
Latte ovicaprino *(5)*			638	2,0	711	7,1

(1) Inclusi i bufalini
(2) Di cui 100,1 milioni di polli, 55,5 galline ovaiole, 11, 1 tacchini, 5,0 faraone, 1,7 anatre e oche. Fonte UNA
(3) Produzione in milioni di pezzi
(4) Produzione in 000 hl.; nel latte vaccino è incluso il latte bufalino
(5) Peso vivo per la carne

Numeri indici (base 1985=100)

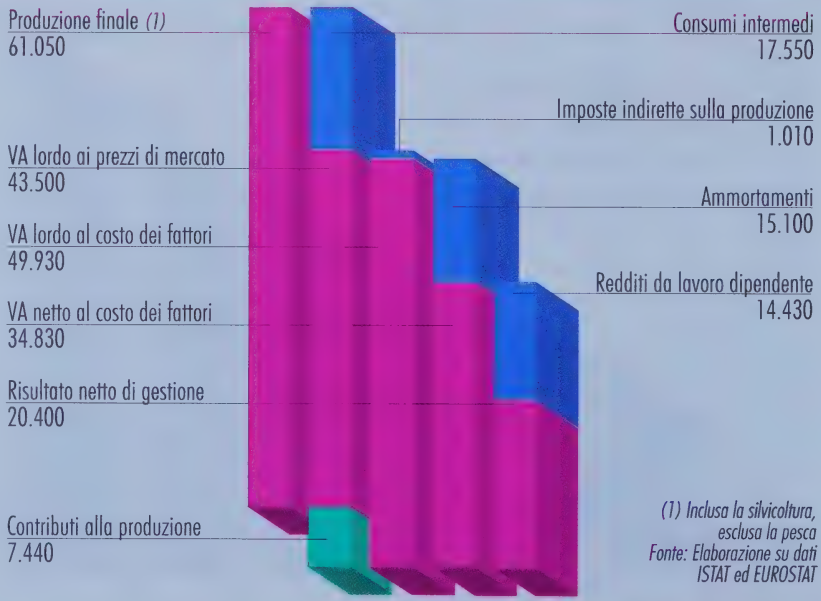


Nel 1993 i prezzi dei consumi intermedi hanno presentato un sensibile incremento (6,6%) sopratutto per i prodotti petroliferi (20,5%).
I beni di investimento sono cresciuti del 5% circa, tasso leggermente inferiore a quello del 1992.
Il costo del lavoro ha registrato un andamento rallentato (4,9%) rispetto al 1992.
Il livello medio dei prezzi agricoli alla produzione è rimasto stazionario (0,4%) in seguito all'accentuata flessione delle colture arboree (-5,9%) compensata da un leggero incremento nelle produzioni erbacee (0,9%) e da una più sostanziale crescita delle quotazioni dei prodotti zootecnici (4,4%).
La ragione di scambio tra prezzi agricoli e costi di produzione ha fatto registrare, anche nell'anno in esame, un deterioramento.

PLV e Reddito Agricolo

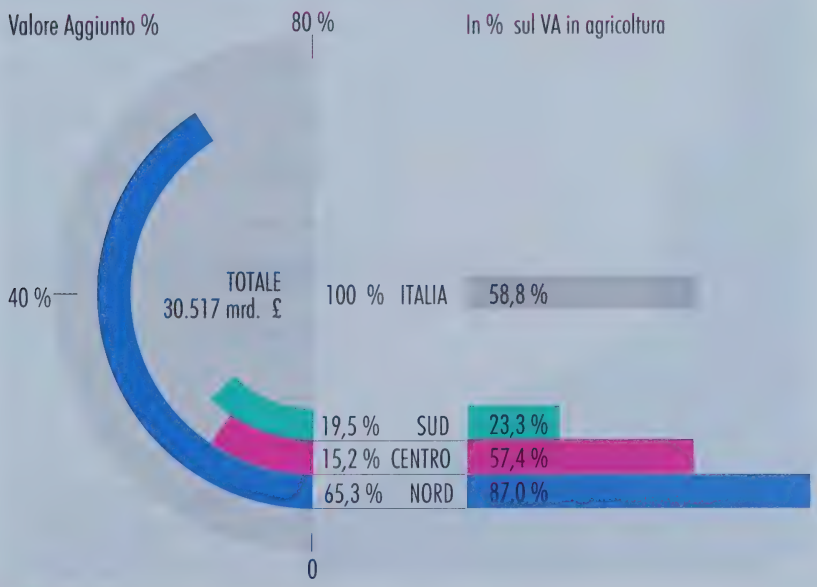
Nel 1993 la produzione vendibile agricola (PLV), inclusi i contributi, alla produzione, è stata così ripartita: 26% consumi intermedi (sementi, concimi, mangimi, energia, ecc.), 24% redditi da lavoro dipendente.
I contributi e le sovvenzioni, erogati dallo Stato e dalla UE, hanno inciso per l'11%, con un sensibile aumento della quota nei confronti dell'anno precedente.
Al lavoro autonomo (coltivatori, imprenditori e coadiuvanti familiari) al capitale e all'impresa è andato circa il 30%, agli ammortamenti il 22%. Rispetto al 1992 si registra una tenuta del risultato netto di gestione in valori correnti, grazie all'effetto dei contributi alla produzione che hanno compensato la flessione del valore aggiunto.

Composizione del reddito agricolo



(1) Inclusa la silvicoltura, esclusa la pesca
Fonte: Elaborazione su dati ISTAT ed EUROSTAT

VA al costo dei fattori



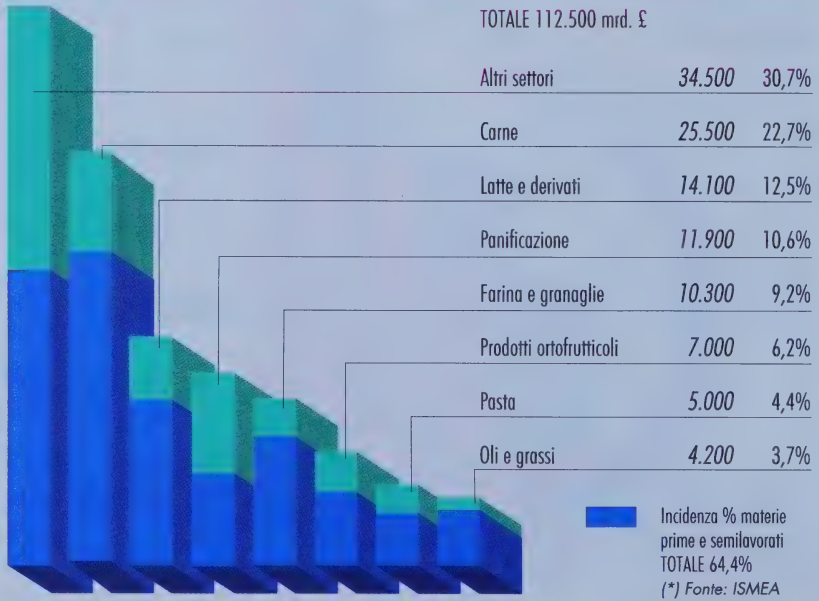
L'industria alimentare rappresenta circa il 10% del VA al costo dei fattori delle attività manifatturiere.
Il suo peso è cresciuto negli ultimi anni e tra i settori più dinamici si annoverano: le paste alimentari, la lavorazione della carne e dei prodotti ittici, la trasformazione dei prodotti ortofrutticoli, i surgelati, i prodotti dietetici e per l'infanzia, le bevande analcoliche e le acque minerali.
Nel 1993 il VA dell'industria alimentare si è riconfermato, in termini reali, sugli stessi livelli del 1992, nonostante la congiuntura particolarmente sfavorevole per l'economia italiana ed in particolare per la trasformazione industriale.
In questo settore sono stati introdotti processi di lavorazione e tecnologie innovative che hanno stimolato l'espansione di nuovi mercati; inoltre le abitudini di acquisto del consuma-

tore si sono sensibilmente evolute. Nel nostro paese il mercato dell'industria alimentare è in continua evoluzione ed attira notevoli investimenti italiani e stranieri: aumenta così la concentrazione ma l'apparato produttivo è ancora fortemente caratterizzato da una ampia presenza di piccole e medie imprese.

Forti squilibri di tipo territoriale, strutturale e tecnologico permangono soprattutto fra il Sud e il Centro-Nord. Le attività di trasformazione sono concentrate prevalentemente al Nord dove, negli ultimi dieci anni, il VA è aumentato del doppio rispetto a quello del meridione.

Nella Unione Europea l'agroalimentare costituisce uno dei settori di punta sotto l'aspetto dell'occupazione e del VA. La crescita del fatturato è relativamente più sensibile nelle aree del Nord Europa, soprattutto in Francia e Germania.

Produzione dell'industria alimentare per settori, valori 1992 (*)


TOTALE 112.500 mrd. £
Altri settori 34.500 30,7%
Carne 25.500 22,7%
Latte e derivati 14.100 12,5%
Panificazione 11.900 10,6%
Farina e granaglie 10.300 9,2%
Prodotti ortofrutticoli 7.000 6,2%
Pasta 5.000 4,4%
Oli e grassi 4.200 3,7%
Incidenza % materie prime e semilavorati TOTALE 64,4%
(*) Fonte: ISMEA

Industria alimentare nell'Unione Europea nel 1992 (*)

Paesi	Fatturato %	Occupazione %
Italia	12,1	8,9
Francia	19,6	15,1
Germania R.F.	22,8	21,9
Benelux	10,7	8,6
Danimarca	3,1	2,7
Regno Unito	17,2	21,6
Spagna	9,4	14,3
Altri *(1)*	5,1	6,9
UE	*(2)* 486.595	*(3)* 2.378,2

Produzione in Italia: tendenze

Settori	1993/92
Molitura e pastificazione	↓
Biscotti e panificazione	↑
Lavorazione ortofrutticoli	↓
Grassi vegetali e animali	↓↓
Macellazione bestiame e lav.ne carni	↑
Lattiero-caseario	↓
Produzione zucchero	↑
Dolciario	↑
Surgelati	↑
Preparati vari	↑
Acquaviti e liquori	↓
Ind. idro-minerale e bev. analcoliche	↑
Birra e malto	↓
Mangimi	↓

(*) Incluse bevande e tabacco
(1) Irlanda, Grecia, Portogallo
(2) Milioni di ECU; tasso di conversione (1992) 1 ECU = 1595 lire circa
(3) 000 Unità di lavoro
Fonte: EUROSTAT - Panorama de l'industrie communautaire - supplement conjoncturel n.6/1993

Distribuzione

Da diversi anni nel settore della distribuzione alimentare è in atto un processo di razionalizzazione caratterizzato dalla diminuzione degli esercizi al dettaglio tradizionali.
Anche gli esercizi all'ingrosso, analizzando il periodo più recente, tendono a diminuire.

Queste tendenze trovano conferma nei dati delle anagrafi delle Camere di commercio: nel corso del 1992 sono stati chiusi 5.400 esercizi all'ingrosso a fronte dei circa 4.000 aperti, con un saldo negativo di 1.400 esercizi.
Nel dettaglio fisso si sono verificate 13.100 aperture e 23.300 chiusure (-10.200); nell'ambulante 2.100 aperture e 5.200 chiusure (-3.100). Il calo ha risentito, probabilmente, anche del clima di generale difficoltà attraversato dalla nostra economia e della ridotta capacità di acquisto dei consumatori.

Sistema distributivo alimentare in Italia (1)

	NORD		CENTRO		SUD		ITALIA	
	n.	%	n.	%	n.	%	n.	variaz. % sull '82
INGROSSO								
	17.626	47,4	6.331	17,0	13.219	35,6	37.176	9,9
DETTAGLIO								
Fisso	124.176	41,4	60.400	20,3	113.485	38,1	298.061	-12,6
Ambulante	14.775	43,1	7.479	21,8	12.053	35,1	34.307	-34,2

(1) Dati al 1 gennaio 1992
Fonte: Elaborazione su dati del Ministero Industria, Commercio e Artigianato

La grande distribuzione alimentare

I dati sulla grande distribuzione alimentare al dettaglio confermano lo sviluppo di questo settore: al primo gennaio '93 i supermercati sono risultati circa 3.700, con un incremento del 7% sull'anno precedente. Rispetto al 1992 la superficie di vendita di questi esercizi è aumentata dell'8%, contemporaneamente gli addetti sono cresciuti del 9%.

Il 55% dei supermercati risulta operante al Nord, il 20% al Centro ed il 25% al Sud.

I rapporti tra la consistenza numerica e la superficie di vendita con l'ammontare della popolazione evidenziano il notevole divario tra Nord e Mezzogiorno: nel Sud l'offerta risulta alquanto inferiore alla domanda, sia in termini di unità di vendita che di superficie.

Distribuzione alimentare per ripartizioni territoriali (1)

Ripartizioni Territoriali	Unità operative	Superficie di vendita (m^2)	Addetti	Numero di unità per 100.000 abitanti	Sup. di vendita m^2/1.000 abitanti
Nord	2.050	1.831.784	47.007	8,1	72,1
Centro	721	605.423	16.941	6,5	55,3
Sud	925	695.066	12.148	4,5	33,6
Totale	3.696	3.132.273	76.096	6,5	54,9

(1) Supermercati autonomi e reparti alimentari di grandi magazzini
Fonte: Ns. elaborazioni su dati Ministero dell'industria del commercio e dell'artigianato, caratteri strutturali del sistema distributivo in Italia, Roma settembre 1993

Nel 1993 la spesa per i consumi alimentari è stata di circa 179.000 mrd di lire correnti, con un incremento dell'1,8% in valore ed una contrazione dello 0,2% in quantità.
Gli acquisti hanno risentito della difficile congiuntura e quasi tutti i principali prodotti hanno presentato una flessione; lievi gli incrementi per pane e derivati di cereali, lattiero-caseari e ortofrutticoli.
La quota dei consumi alimentari tende a diminuire: nel '93 essa ha rappresentato il 18,4% del totale consumi finali interni (nell'83 era il 24,7%).
Anche le abitudini dei consumatori cambiano sensibilmente: diminuisce la componente domestica mentre aumenta quella dei pasti fuori casa che, se considerata, fa salire la spesa a circa 210.000 mrd di lire, incluse le spese dei turisti stranieri in Italia.
La categoria più rilevante è quella della carne (49.000 mrd), sebbene la

Struttura dei consumi alimentari

Prodotti	% sulla spesa alimentare	tasso medio annuo var. 1984/93 quantità %	prezzi %
Pane e trasformati di cereali	12,6	0,75	8,02
Carne	27,4	0,13	5,55
Pesce	6,2	2,55	10,99
Lattiero-caseari e uova	14,0	0,73	7,58
Oli e grassi	3,7	0,40	6,91
Ortofrutta *(1)*	21,5	0,53	7,74
Altri *(2)*	6,7	1,37	7,69
Bevande alcoliche	5,6	-1,21	6,86
Bevande analcoliche	2,3	6,21	14,22
IN COMPLESSO	100,0	0,58	7,28

(1) Comprese le patate
(2) Caffè, the, cacao, zucchero, confetture, prodotti industria dolciaria, ecc.

Consumi alimentari nell'Unione Europea (Kg pro capite)(*)

Prodotti	Italia	Francia	Spagna	Grecia	Germania	Regno Unito	UNIONE EUROPEA
Cereali e derivati *(1)*	110	73	71	110	71	74	80
Riso	5	4	6	5	2	4	4
Patate	37	72	108	90	74	94	78
Ortaggi *(2)*	182	124	192	230	83	65	117
Frutta e agrumi *(2)*	128	85	121	94	107	63	93
Latte *(3)*	65	101	98	63	91	129	98
Formaggi	18	23	4	19	16	7	14
Burro	2	9	0,6	0,9	7	3	5
Carni totale	88	111	102	77	97	74	93
Bovina	25	30	13	20	21	19	22
Suina	32	37	49	21	56	24	40
Oli e grassi vegetali	25	18	28	34	17	19	21
Zucchero *(4)*	28	34	27	30	37	40	34
Vino *(5)*	62	66	41	26	23	12	37

N.B. I dati sono riferiti alla campagna '91/'92; i lattiero caseari e carni al 1991
(1) In equivalente farina
(2) Compresi i trasformati, la frutta secca e in guscio
(3) Compresi altri prodotti allo stato fresco
(4) Equivalente zucchero bianco
(5) Litri pro-capite

sua incidenza tenda a diminuire. Seguono in ordine di importanza: i prodotti ortofrutticoli, con circa 39.000 mrd, patate incluse; il pane ed i prodotti a base di cereali con 23.000 mrd; il pesce con oltre 11.000 mrd; il vino e le altre bevande alcoliche con quasi 10.000 mrd.

Negli ultimi dieci anni la tendenza dei consumi alimentari rileva la diminuzione di carne, vino e bevande alcoliche, contro l'aumento di pesce, uova e lattiero-caseari.

I livelli dei consumi pro-capite sottolineano la forte componente mediterranea della domanda alimentare italiana che, rispetto alla media dell'Unione Europea, è superiore di quasi il 40% per i prodotti a base di cereali, del 50% circa per gli ortaggi, del 70% per il vino.

Viceversa il consumo di latte è inferiore del 30% e quello della carne suina del 20% circa.

Il complesso della produzione agroindustriale nazionale è inferiore al consumo, per cui la bilancia commerciale è in costante deficit.
Il tasso di autoapprovvigionamento, che aveva subito un calo tra il 1970 ed il 1980, tra il 1980 ed il 1993 è migliorato grazie soprattutto all'aumento della propensione ad esportare.
I dati relativi alla bilancia commerciale 1993 vedono confermati i buoni risultati della passata annata: il disavanzo con l'estero, già calato nel 1992, si è ridotto del 10% circa.

Bilancio agro-alimentare e sistema agro-industriale (*)

Prodotti	1970	1980	1993
AGGREGATI MACROECONOMICI			
Totale produzione agro-industriale *(1)*	90.695	97.617	100.907
Importazioni	21.970	31.707	34.314
Esportazioni	7.378	11.470	18.987
Saldo	-14.592	-20.237	-15.327
Volume di commercio *(2)*	29.348	43.177	53.301
Consumo apparente *(3)*	105.287	117.854	116.234
INDICATORI			
Grado di autoapprovvigionamento *(4)*	86,1	82,8	86,8
Propensione a importare *(5)*	20,9	26,9	29,5
Propensione a esportare *(6)*	8,1	11,8	18,8
Grado di copertura commerciale *(7)*	33,6	36,2	55,3

(*) mrd, £ a Prezzi 1993
(1) PLV agricoltura, silvicoltura e pesca e valore aggiunto dell'industria alimentare
(2) Somma delle esportazioni e delle importazioni
(3) Produzione agroindustriale più le importazioni e meno le esportazioni
(4) Rapporto tra produzione e consumi
(5) Rapporto tra importazioni e consumi
(6) Rapporto tra esportazioni e produzioni
(7) Rapporto tra esportazioni e importazioni
Fonte: Elaborazione su dati ISTAT

Commercio estero per principali categorie di prodotti agricoli-alimentari (mrd £)

Prodotti	Importazione	Esportazione	Saldo
COLTURE	8.119	4.804	-3.315
Cereali	2.276	235	-2.041
Frumento	1.795	111	-1.684
Granturco	213	65	-148
Ortaggi freschi	736	1.019	283
Frutta	1.396	2.657	1.261
Agrumi	101	126	25
Caffe' ed altri coloniali	887	18	-869
Semi e frutti oleosi	714	6	-708
Tabacchi greggi	182	267	85
Cotone	697	10	-687
ALLEVAMENTI	4.306	70	-4.236
Animali vivi	2.472	36	-2.436
Latte *(1)*	1.457	24	-1.433
SILVICOLTURA	1.171	107	-1.064
PESCA E CACCIA	2.480	269	-2.211
Pesce fresco e cong.	2.344	261	-2.083

Prodotti	Importazione	Esportazione	Saldo
INDUSTRIA ALIMENTARE	13.712	10.322	-3.390
Farine e paste	53	1.592	1.539
Riso	21	532	511
Zucchero	196	216	20
Dolciari	540	829	289
Carni	5.441	1.320	-4.121
Pesci lavorati	927	135	-792
Pomodori lavorati	62	1.035	973
Altri ortofrutt. trasf.	636	1.088	452
Formaggio e burro	2.132	1.038	-1.094
Olio di oliva	1.066	603	-463
Altri oli e grassi	475	201	-274
VINO E VERMUT	199	2.319	2.120
ALTRE BEVANDE	781	621	-160
ALTRI PRODOTTI AGRICOLI TRASFORMATI	3.546	474	-3.072
TOTALE	34.314	18.986	-15.327

(1) Fresco e conservato

Commercio di prodotti agricoli-alimentari (*) con la UE e Paesi Terzi (mrd £)

Aree e Paesi	Importazioni	Esportazioni	Saldo
UNIONE EUROPEA	23.745	12.396	-11.349
Francia	7.356	2.602	-4.754
Germania R.F.	5.113	5.314	201
Belgio-Lussemburgo	1.439	654	-785
Olanda	4.499	803	-3.696
Danimarca	1.521	213	-1.308
Spagna	1.498	629	-869
Grecia	972	363	-609
Regno Unito	1.007	1.623	616
EUROPA EST *(1)*	940	1.312	372
Polonia	267	75	-192
Ungheria	265	55	-210
ALTRI PAESI EUROPA *(2)*	1.191	1.759	568
Norvegia	136	76	-60
Austria	351	429	78
Svizzera	346	878	532
AMERICA	3.607	1.820	-1.787
USA	1.035	1.345	310
Canada	146	249	103
Argentina	605	71	-534
AFRICA	1.149	839	-310
MEDIO ORIENTE	179	466	287
ASIA E OCEANIA	1.154	531	-623

(*) Esclusi i prodotti della silvicoltura, fibre tessili, lane ed altri prodotti agricoli non alimentari. (1) Paesi ex COMECON. Russia e altri paesi CSI. ex Iugoslavia e Albania
(2) Paesi scandinavi, Austria, Svizzera, Malta e altri paesi europei, Turchia inclusa. Fonte: Elaborazione su dati ISMEA e ISTAT

STRUTTURE AGRICOLE

Aziende e Relativa Superficie

Il censimento del 1990 ha rilevato la presenza in Italia di 3.023.344 aziende agricole, forestali e zootecniche, con una superficie totale pari a 22,7 milioni di ha (di cui il 66,3% di SAU).

Questi dati, insieme a quelli dei precedenti censimenti, dimostrano che, in quaranta anni, circa il 30% di aziende (per lo più unità di scarsa produttività e competitività) sono scomparse dallo scenario agricolo.

Questo processo di lento ma continuo abbandono continua ad interessare la totalità delle regioni italiane, ad eccezione della Provincia autonoma di Bolzano.

Il decremento registrato per le superfici (totale e SAU) risulta più contenuto ed uniforme.

Dall'esame territoriale risulta che nel 1990 le aziende si distribuiscono per il 30% nell'Italia settentrionale, per il 17,4% nell'Italia centrale e per ben

Aziende, superficie totale e SAU (censimento 1990)

Aziende

904	Nord	-13,3
528	Centro	- 4,9
1.591	Sud	- 4,8
3.023	ITALIA	- 7,5

659	Montagna	- 11,2
1.524	Collina	- 6,2
840	Pianura	- 7,0

Superficie Totale

8.516	Nord	- 4,5
4.502	Centro	- 3,7
9.684	Sud	- 3,5
22.702	ITALIA	- 3,9

7.745	Montagna	- 4, 8
9.711	Collina	- 3,8
5.246	Pianura	- 2,9

SAU

		Variazioni % rispetto al 1982
5.206	Nord	- 4,8
2.707	Centro	- 5,2
7.133	Sud	- 5,1
15.046	ITALIA	-5,0

3.639	Montagna	- 7,0
6.849	Collina	- 5,0
4.558	Pianura	- 3,5

il 52,6% nel Mezzogiorno che, pertanto, continua ad ospitare la maggior parte delle aziende italiane.

Tuttavia, la scomparsa di un così alto numero di aziende, a causa della scarsissima remunerativitàdelle produzioni, come pure l'assorbimento, in molti casi, della loro superficie in unità produttive più ampie, non ha influito sulla dimensione media aziendale che, nel 1990, registra incrementi piuttosto lievi (7,5 ha di superficie totale e 5 ha di SAU).

Nelle tre circoscrizioni territoriali, tra il 1982 ed il 1990, la superficie totale media aziendale è passata, al Nord da 8,6 a 9,4 ettari, mentre è rimasta quasi inalterata al Centro e al Sud, dove l'azienda part-time, attraverso l'integrazione dei redditi, sembra assicurare una migliore risposta alle esigenze delle famiglie agricole.

Riguardo alle zone altimetriche, le variazioni della superficie totale media aziendale hanno interessato in senso positivo tutte e tre le aree.

La distribuzione delle aziende secondo la classe di superficie totale è rimasta pressochè invariata rispetto al 1982, ad ulteriore conferma della persistenza nel nostro Paese di un notevole numero di aziende di piccole dimensioni.

Alla data del censimento, infatti, oltre un milione di aziende (32,8% del totale) non superavano la dimensione di 1 ettaro, occupando complessivamente una superficie totale di circa 482 mila ettari (2,1% del totale).

Aziende e relativa superficie totale per classe di SAU (censimento 1990)

	1990				1982			
	aziende	%	superficie totale	%	aziende	%	superficie totale	%
Senza terreno agrario	5.691	0,2	-	-	10.176	0,3	-	-
Meno di un ettaro	991.562	32,8	481.722	2,1	1.040.957	31,9	506.210	2,1
1-2	590.942	19,5	814.640	3,7	641.127	19,6	884.246	3,7
2-3	335.995	11,1	798.958	3,5	372.621	11,4	885.335	3,8
3-5	373.850	12,4	1.411.821	6,2	419.911	12,8	1.584.646	6,7
5-10	354.401	11,7	2.436.234	10,8	397.823	12,2	2.731.129	11,6
10-20	201.321	6,7	2.747.371	12,1	217.137	6,6	2.958.790	12,5
20-30	65.242	2,2	1.561.974	6,9	66.464	2,0	1.588.085	6,7
30-50	49.743	1,6	1.870.238	8,2	48.549	1,5	1.818.718	7,7
50-100	32.722	1,1	2.217.720	9,7	31.735	1,0	2.154.812	9,1
100 e oltre	21.875	0,7	8.361.878	36,8	22.670	0,7	8.519.524	36,1
Totale	3.023.344	100,0	22.702.556	100,0	3.269.170	100,0	23.631.495	100,0

Allevamenti

Nell'ambito della Unione Europea, l'Italia si presenta come un paese a scarsa vocazione zootecnica, pur disponendo di notevoli superfici investite a coltivazioni foraggere.
Le aziende zootecniche in Italia occupano il 34,5% dell'universo nazionale ma hanno subito, rispetto al 1982, un calo sia in termini di numero di aziende che di capi allevati (ad eccezione degli ovi-caprini).
Il ridimensionamento degli allevamenti più diffusi in Italia, bovini, suinicolo e avicoli, a tutto vantaggio dell'ovicaprino, è dovuto soprattutto all'evoluzione tecnica connessa con la crisi che ha colpito maggiormente le zone di montagna e collina, con l'inevitabile abbandono di terreni economicamente marginali e con i vincoli di produzione imposti dalla politica comunitaria.

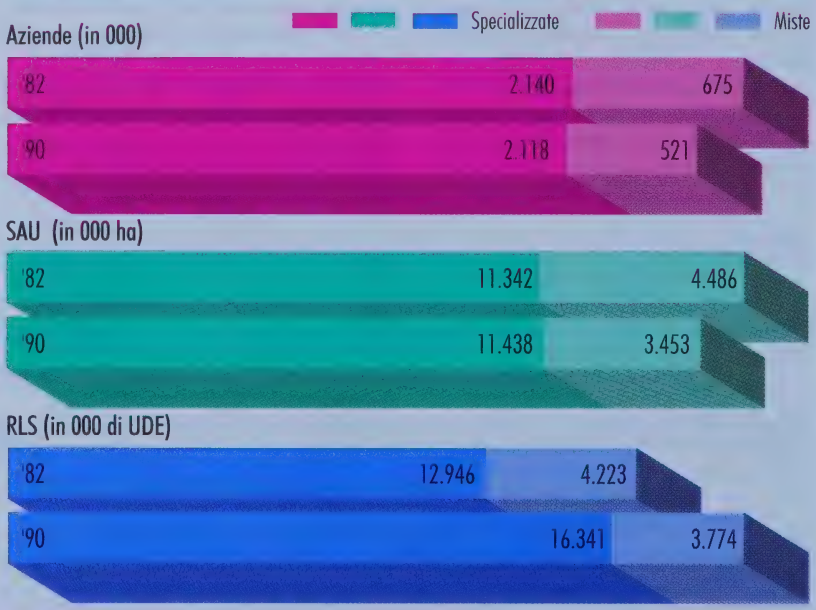
Aziende con allevamenti e relativo numero di capi (in 000)

Specie e categorie	1982			1990				
	Italia			Italia			Resto CEE 12	
	Aziende	Capi	N. medio capi per azienda	Aziende	Capi	N. medio capi per azienda	Capi	N. medio capi per azienda
Bovini	500	8.686	17	320	7.759	24	72.163	37
Vacche da latte	330	2.621	8	206	2.642	13	20.663	18
Suini	534	8.923	17	346	8.392	24	87.969	74
Ovini	171	6.622	39	159	8.722	55	95.809	120
Caprini	109	986	9	87	1.246	14	9.018	17
Equini	121	257	2	71	224	3	1.633	2

Indirizzi Produttivi

Oltre l'80% delle aziende italiane tende a specializzarsi nelle proprie produzioni, mostrando un sensibile aumento rispetto al 1982.
Tali aziende coprono il 76,8% della SAU e concorrono alla formazione dell'81,2% del reditto lordo standard (RLS) nazionale.
Soltanto l'11,1% delle aziende risulta specializzato nelle produzioni di allevamenti erbivori (bovini, ovini, caprini, equini) o granivori (suini e pollame).
Le produzioni vegetali, invece, sono privilegiate da oltre l'81% delle aziende, con netta preferenza verso le produzioni provenienti dalle coltivazioni legnose agrarie (43,8%), ed in particolare dalla vite (10,3%) e dall'olivo (14,4%).
Si tratta, tuttavia, di produzioni a limitata redditività; infatti a fronte di un reddito annuo medio aziendale di 6,9 UDE (poco più di 12 milioni di

Aziende, SAU e RLS, per tipologia aziendale



lire '86) le aziende specializzate nelle coltivazioni legnose permanenti ricavano annualmente 5,1 UDE (pari a circa 9 milioni di lire) contro le 33,5 UDE delle aziende orto-floricole e le 29,7% UDE di quelle specializzate nelle produzioni suinicole e/o avicole.

In termini di impiego di manodopera, dei 2 milioni di ULA presenti nel 1990, oltre il 75% è impegnato nelle aziende con indirizzi produttivi specializzati, ed in particolare il 33% nelle aziende con produzioni legnose.
Ciascuna ULA contribuisce mediamente per 10 UDE (poco più di 17 milioni di £) in misura diversa rispetto all'indirizzo produttivo; così, mentre ad una ULA impiegata nelle aziende granivore spettano 22 UDE, in quelle specializzate nelle coltivazioni permanenti il RLS medio scende a 9,7 UDE.

Aziende e relativo RLS

Orientamenti Tecnico-economici	N. aziende	Reddito lordo standard (in UDE)		
		totale	per azienda	per ULA
Seminativi	714.066	4.913.843	6,9	12,6
Ortofloricoltura	46.424	1.552.970	33,5	17,0
Coltivazioni permanenti	1.287.815	6.512.171	5,1	9,7
Erbivori	305.749	2.886.303	9,4	8,3
Granivori	19.517	579.927	29,7	22,0
Policoltura	338.731	2.006.013	5,9	6,2
Poliallevamento	62.500	450.337	7,2	7,9
Coltivazioni - Allevamenti	165.744	1.336.066	8,1	
Totale	2.940.546	20.237.630	6,9	10,0

Il 71,1% delle aziende italiane non supera le 4 UDE medie aziendali (circa 7 milioni di £) ed in particolare il 55% ottiene meno di 2 UDE.
È importante evidenziare che in queste aziende risulta presente il 31,8% della forza di lavoro agricolo nazionale.
Al contrario, oltre il 64% del reddito lordo nazionale risulta concentrato nell'8,8% delle aziende, con l'impiego del 36,2% delle ULA complessive, a ciascuna delle quali spettano mediamente 17,7 UDE (poco più di 31 milioni di lire).
I risultati economici per ripartizioni territoriali confermano, in linea di massima, le forme di utilizzazione dei terreni in azienda; pertanto le aziende dislocate nelle Regioni del Centro-Nord risultano orientate esclusivamente o prevalentemente verso produzioni di seminativi, mentre quelle meridionali risultano specializzate nelle coltivazioni permanenti.
In termini di grandi aggregati, le aziende del Nord contribuiscono per il 46,5% al RLS nazionale, con 10,8 UDE in media per azienda (poco più di 19 milioni di £), impiegando il 39,3% delle ULA nazionali, cioè 0,9 ULA per azienda.
Le aziende agricole dell'Italia centrale producono RLS per il 15,3%, con una media aziendale di 6 UDE e il concorso del 16% delle ULA.
Nel meridione viene prodotto il 38,2% del RLS nazionale con in media 0,6 ULA ed un reddito di 5 UDE per azienda.

Aziende e relativo RLS per classe di dimensione economica

Classe di UDE	Aziende	Reddito lordo standard (in UDE)		
		totale	per azienda	per ULA
Meno di 1 UDE	1.067.061	485.524	0,5	3,2
1 - 2	542.011	754.231	1,4	
2 - 4	482.646	1.352.417	2,8	5,1
4 - 6	225.652	1.094.040	4,8	59,0
6 - 8	132.482	910.186	6,9	6,6
8 - 12	149.803	1.456.493	9,7	7,5
12 - 16	83.924	1.156.640	13,8	8,6
16 - 20	170.063	4.183.970	24,6	11,7
40 - 100	64.421	3.846.666	59,7	18,5
100 ed oltre	22.483	5.014.463	223,0	29,4
TOTALE	2.940.546	20.254.630	6,9	10,0

Aziende, RLS, SAU ed ULA per regioni e per circoscrizioni territoriali

	N. aziende	RLS (in UDE)		SAU (ha)		N. ULA	
		Totale (000 UDE)	Media UDE	Totale	Media	Totale	Media
Piemonte	179.138	1.592.950	8,8	1.118.722	6,2	168.419	0,9
Valle d'Aosta	8.735	29.588	3,4	96.592	11,1	8.029	0,9
Liguria	69.453	286.287	4,1	92.421	1,3	50.417	0,7
Lombardia	126.393	2.016.897	16,0	1.103.793	8,7	144.419	1,1
Trentino-A.A.	57.204	525.805	9,2	422.274	7,4	57.834	1,0
Veneto	220.863	2.013.196	9,1	880.555	4,0	163.852	0,7
Friuli-V.G..	55.684	398.748	7,2	256.558	4,6	35.257	0,6
Emilia Romagna	148.024	2.460.335	16,6	1.231.054	8,3	169.888	1,1
Toscana	143.922	992.280	6,9	923.525	6,4	109.104	0,8
Umbria	57.552	348.349	6,1	395.125	6,7	33.878	6,0
Marche	79.451	577.871	7,3	547.603	6,9	59.487	0,7
Lazio	235.372	1.181.857	5,0	831.195	3,5	122.874	0,5
Abruzzo	106.070	529.426	5,0	520.518	4,9	72.332	0,7
Molise	40.812	178.940	4,4	249.851	6,1	26.145	0,6
Campania	270.539	1.276.338	4,7	659.851	2,4	203.163	0,8
Puglia	345.563	1.951.199	5,6	1.446.639	4,2	178.757	0,5
Basilicata	81.780	375.523	4,6	621.002	7,6	42.482	0,5
Calabria	209.543	964.758	4,6	660.402	3,2	117.994	0,6
Sicilia	388.553	1.927.705	5,0	1.572.912	4,0	178.000	0,5
Sardegna	115.895	609.578	5,3	1.356.231	11,7	85.929	0,7
Italia	2.940.546	20.237.630	6,9	14.986.822	5,1	2.028.260	0,7
Nord	865.494	9.323.806	10,8	5.201.969	6,0	798.115	0,9
Centro	516.297	3.100.357	6,0	2.697.448	5,2	325.343	0,6
Sud	1.558.755	7.813.467	5,0	7.087.405	4,4	904.802	0,6

Nel 1990 le aziende agricole nella Comunità ammontavano a 8,2 miliardi, di cui ben il 32,6% localizzato in Italia, seguita da Spagna (19,5%) e Francia (12,4%).
La superficie agricola utilizzata (SAU) pari, nel complesso, a circa 115 milioni di ettari è ripartita in modo non uniforme tra i paesi della Comunità: il 24, 9% è localizzata in Francia, seguita dalla Spagna e dal Regno Unito. In quest'ultimo paese si registra la maggiore superficie media aziendale pari a 67,9 ha, mentre le aziende mediamente più piccole sono localizzate in Grecia (4,0 ha), Italia (5,6 ha) e Portogallo (6,7 ha).
Relativamente alla produttività della terra (espressa in termini di Reddito Lordo Standard per 100 ettari di SAU), il valore più alto si riscontra in Olanda dove sono concentrate aziende zootecniche senza terra ed aziende orticole specializzate. A livelli elevati si collocano anche il Belgio e l'Italia.
Per quanto riguarda invece la produttività del lavoro (espressa come RLS per unità di lavoro annuo), i valori più elevati si riscontrano nei paesi dell'Europa Settentrionale mentre nei paesi mediterranei, ca-

Utilizzazione del suolo (SAU in 000 ha)

	Seminativi				
	Totale	Cereali	Legumi secchi	Piante sarchiate	Piante industriali
EUR 12	60.483,1	33.783,8	1.311,1	4.802,6	5.090,8
Belgio	755,6	331,4	3,5	167,8	19,6
Danimarca	2.550,4	1.562,9	124,5	206,9	236,4
Germania	7.258,8	4.631,8	72,3	651,8	474,2
Grecia	2.053,1	1.259,2	22,8	78,6	348,3
Spagna	12.007,3	7.342,1	150,9	273,6	959,7
Francia	17.136,8	9.104,1	565,6	2.159,8	1.968,7
Irlanda	600,7	301,5	2,8	71,2	6,2
Italia	8.071,6	4.468,6	58,5	340,1	574,3
Lussemburgo	56,0	34,3	0,5	1,0	1,3
Belgio	907,7	182,1	18,1	308,5	10,6
Portogallo	2.345,3	862,3	74,5	102,8	61,6
Regno Unito	6.739,8	3.703,5	217,0	440,5	429,9

Prati perm. e pascoli	Colture permanenti			Boschi	TOTALE
	Totale	Vite	Olivo		
43.943,0	10.079,6	3.806,8	3.428,7	14.757,1	129.262,8
572,9	15,5	-	-	6,9	1.350,9
218,5	10,2	-	-	138,3	2.917,4
4.313,8	171,3	-	98,0	1.513,7	13.257,6
557,1	1.046,6	714,5	130,6	44,2	3.701,0
8.448,2	4.048,6	1.744,8	1.057,8	4.692,8	29.197,0
10.196,4	1.184,7	11,3	949,1	2.241,9	30.759,8
3.840,2	0,8	-	-	75,2	4.516,9
4.105,9	2.732,1	995,7	924,8	4.681,3	19.590,9
68,9	1,4	-	1,3	10,5	136,8
1.072,0	31,6	-	-	19,1	2.030,4
838,0	789,4	340,5	266,0	978,3	4.951,0
9.711,0	47,4	-	1,1	354,9	16.853,1

ratterizzati da aziende più piccole e da colture, come le arboree, a forte carico di lavoro, risulta inferiore. In questi stessi paesi c'è una più alta percentuale di occupati a tempo parziale.

La SAU è destinata prevalentemente a seminativi (60% circa) in Danimarca, Germania, Francia e Portogallo. In Irlanda, invece, ben l'86,5% è investito a prati permanenti e pascoli, a testimonianza dell'importanza dell'allevamento.

La percentuale di SAU destinata alle colture permanenti cresce considerevolmente nel Sud della Comunità: il 28,5% in Grecia, il 19,7% in Portogallo, il 18,3% in Italia, il 16,5% in Spagna, mentre queste colture sono pressochè assenti in Irlanda, Regno Unito e Danimarca. La produzione bovina è invece concentrata in Francia (26,5%), Germania (18,2%) e Regno Unito (15,1%).

Confronti comunitari

Paesi	N. aziende (in 000)	SAU (000 ha)	N. ULA (in 000)	RLS/100 ha di SAU *(1)*	RLS/ULA *(1)*	Addetti a tempo pieno *(2)*
EUR 12	8.168,1	114.691	8.036	79,4	11,3	20,6
Belgio	85,0	1.345	101	178,5	23,7	51,6
Danimarca	81,3	2.779	95	109,1	31,9	47,0
Germania	665,1	11.768	787	100,9	15,1	29,1
Grecia	923,5	3.671	772	106,5	5,1	9,1
Spagna	1.593,6	24.531	1.143	36,2	7,8	15,6
Francia	1.013,9	28.568	1.383	75,3	15,5	40,1
Irlanda	170,6	4.442	250	43,4	7,7	58,0
Italia	2.664,6	14.945	1.953	134,7	10,3	9,8
Lussemburgo	3,9	127	6	71,5	14,4	41,8
Belgio	124,8	2.011	226	320,2	28,5	50,7
Portogallo	598,7	4.005	847	57,6	2,7	17,4
Regno Unito	243,1	16.499	474	52,2	18,2	50,7

(1) In UDE
(2) In % sul Totale

RISULTATI ECONOMICI SECONDO LA RICA

Redditi 1992

La Rete d'Informazione Contabile Agricola (RICA) è stata istituita a livello comunitario con il Regolamento n. 79 del 1965 ed ha per obbiettivo principale la raccolta sistematica delle informazioni necessarie a misurare l'evoluzione dei redditi degli imprenditori agricoli e il funzionamento delle imprese.
Attualmente per l'Italia il campione di aziende in contabilità è di 18.000 unità all'anno.
Alla rilevazione dei dati partecipano le Regioni e le Organizzazioni professionali; le metodologie contabili e le procedure di elaborazione sono dell'INEA che è anche l'organo ufficiale tra Stato e CEE per la gestione della Rete.
Le aziende che fanno parte della Rica vengono sottoposte ad un sistema di rilevazione che mette in evidenza le caratteristiche strutturali, le dotazioni di fattori, la composizione della produzione e la struttura dei costi.
Tutte queste informazioni sono disponibili su supporto informativo presso ciascun ufficio regionale dell'INEA.

Risultati per zona altimetrica - media aziendale 1992

	N. aziende	SAU ha	UL ha	PLV	Costi variabili	Costi fissi	Reddito netto
					000 £		
TOTALE	19.398	17,78	1,82	69.214	33.014	16.631	27.773
Montagna	3.852	21,43	1,80	55.543	27.950	14.435	23.042
Collina	9.777	17,61	1,76	58.672	25.014	14.374	24.601
Pianura	5.769	15,65	1,93	96.210	49.953	21.921	36.308

Risultati per circoscrizione - media aziendale 1992

	N. aziende	SAU ha	UL n.	PLV	Costi variabili	Costi fissi	Reddito netto
					000 £		
TOTALE	19.398	17,78	1,82	69.214	33.014	16.631	27.773
Nord	7.405	17,74	2,05	98.758	51.066	24.131	37.452
Centro	3.959	19,64	1,92	63.345	26.546	17.575	24.646
Sud	8.034	16,91	1,56	44.876	19.561	9.253	20.394

Risultati per circoscrizione - variazione 1992/91

	PLV		Variaz. %	Costi variabili		Variaz. %	Costi fissi		Variaz. %	Reddito netto		Variaz. %
	1991	1992		1991	1992		1991	1992		1991	1992	
TOTALE	69.774	69.214	-0,8	32.550	33.014	1,4	15.697	16.631	6,0	29.765	27.773	-6,6
Nord	103.465	98.758	-4,5	53.041	51.066	-3,7	23.787	24.131	1,4	41.222	37.452	-9,1
Centro	57.627	63.345	9,9	24.948	26.546	6,4	15.060	17.575	16,7	23.513	24.646	4,8
Sud	46.136	44.876	-2,7	18.290	19.561	6,9	8.768	9.253	5,5	22.893	20.394	-10,9

Risultati per classi di UDE - media aziendale 1992

	N. aziende	SAU ha	UL n.	PLV	Costi variabili	Costi fissi	Reddito netto
					000 £		
TOTALE	19.398	17,78	1,82	69.214	33.014	16.631	27.773
2-4 UDE	1.325	4,98	1,14	15.448	6.016	4.597	6.542
4-8 UDE	4.101	8,40	1,29	23.042	9.917	6.810	9.164
8-16 UDE	5.922	13,77	1,58	41.526	17.970	11.194	17.296
16-40 UDE	5.564	22,69	2,05	80.710	37.823	19.468	33.066
40-100 UDE	2.088	34,23	2,83	175.326	88.925	37.645	69.411
più di 100 UDE	398	61,95	4,66	418.585	224.167	88.863	153.668

Risultati per OTE principale - medie aziendali 1992

	N. aziende	SAU ha	UL n.	PLV	Costi variabili	Costi fissi	Reddito netto
					000 £		
TOTALE	19.398	17,78	1,82	69.214	33.014	16.631	27.773
Seminativi	4.635	20,38	1,60	58.579	23.648	15.487	21.092
Ortofloricoltura	1.327	1,76	2,24	93.413	34.825	16.997	41.687
Colture permanenti	4.809	8,10	1,66	49.236	15.435	13.779	20.257
Erbivori	4.155	30,91	2,05	99.871	62.285	21.121	41.651
Granivori	32	9,62	2,23	418.761	251.183	34.217	144.197
Policoltura	2.006	13,51	1,74	51.577	19.567	13.771	20.682
Poliallevamenti	516	18,33	1,92	58.314	32.589	15.164	23.944
Misti	1.918	22,90	2,00	77.403	45.594	19.656	29.578

PRODOTTI
DI ORIGINE E TIPICI

Prodotti lattiero-caseari

La legge 10 aprile 1954 n. 125 riconosce come "denominazioni di origine" quelle relative ai formaggi prodotti in zone geograficamente limitate osservando usi locali e costanti e le cui caratteristiche merceologiche derivano prevalentemente dalle condizioni proprie dell'ambiente di produzione.
La legge riconosce invece come "denominazioni tipiche" quelle relative ai formaggi prodotti nel territorio nazionale, osservando usi locali e costanti, senza circoscrivere le aree da cui proviene la materia prima, le cui caratteristiche merceologiche derivano, però, da particolari metodi di tecnica di produzione.
La stessa legge prevede l'istituzione di particolari consorzi incaricati di vigilare sulla corretta applicazione delle norme.

Formaggi a denominazione di origine

Asiago
Bra
Caciocavallo Silano
Caciotta d'Urbino
Canestraro Pugliese
Castelmagno
Fiore Sardo
Fontina
Formai De Mut
dell'alta Valle Brembana
Gorgonzola
Grana Padano
Montasio
Mozzarella di bufala campana
Murazzano
Parmigiano Reggiano
Pecorino Romano
Pecorino Sardo
Pecorino Siciliano
Pecorino Toscano
Provolone Valpadana
Quartirolo Lombardo
Raschera
Robiola Roccaverano
Taleggio
Toma Piemontese

Prosciutti e salami a denominazione di origine

Con apposite leggi sono stati riconosciuti i seguenti prodotti a denominazione di origine:

Prosciutto di Parma
Prosciutto di San Daniele
Prosciutto Berico - euganeo
Prosciutto di Modena
Salame di Varzi

Altri prodotti DOC

Castagna di Montella

Prodotti a indicazione geografica protetta

Nocciola del Piemonte
Fungo di Borgotaro
Cappero di Pantelleria

Denominazione di origine dei vini

La legge 10 febbraio 1992 n.164 disciplina la denominazione di origine dei vini. Per denominazione di origine dei vini si intende il nome geografico di una zona viticola particolarmente vocata, utilizzato per designare un prodotto di qualita' e rinomato, le cui caratteristiche sono connesse all'ambiente naturale ed a fattori umani.
Per indicazione geografica tipica dei vini si intende il nome geografico di una zona utilizzata per designare il prodotto che ne deriva.
Tali prodotti si classificano in:
denominazione di origine controllata e garantita (DOCG);
denominazioni di origine controllata (DOC);
indicazione geografiche tipiche (IGT).

Vini DOC italiani per regione

Valle d'Aosta	1
Piemonte	34
Liguria	4
Lombardia	13
Trentino-Alto Adige	8
Veneto	17
Friuli-Venezia Giulia	8
Emilia Romagna	14
Toscana	22
Marche	10
Umbria	8
Lazio	19
Abruzzo	2
Molise	2
Campania	13
Basilicata	1
Puglia	24
Calabria	8
Sicilia	10
Sardegna	18

N.B. Il totale dei vini DOC italiani è 230, meno della somma dei regionali in quanto alcuni sono interregionali

Oli di oliva vergine ed extravergine

La legge 169/92 disciplina il riconoscimento della denominazione di origine controllata degli oli di oliva vergine ed extravergine.
Per denominazione di origine controllata degli oli vergini ed extravergini si intende il nome geografico che individua una zona caratterizzata da specifici fattori naturali o umani, usato per designare gli oli vergini ed extravergini che ne sono originari e le cui caratteristiche sono dovute essenzialmente agli oliveti da cui è ricavata la materia prima e alla tecnica di lavorazione.
Tali denominazioni sono riservate agli oli che rispondono alle condizioni e ai requisiti stabiliti, per ciascuna denominazione, nei relativi disciplinari di produzione.
Al fine di disciplinare l'uso delle denominazioni di origine sono costituiti e riconosciuti Consorzi cui aderiscono i produttori di oli.
È istituito il Comitato nazionale per la tutela delle denominazioni di origine controllata degli oli, con sede presso il Ministero delle risorse agricole, alimentari e forestali, per esprimere parere sui disciplinari di produzione degli oli DOC, per promuovere studi ed attività di propaganda per il miglioramento della produzione e per la tutela degli oli.

ISTITUZIONI E NORME

Nel 1993 l'attività istituzionale è stata caratterizzata e condizionata dagli esiti del referendum del 18 aprile che ha portato alla soppressione del Ministero dell'Agricoltura e delle Foreste.
La situazione di incertezza venutasi a creare si è risolta soltanto a fine 1993 con l'emanazione della legge n.491 del 4 dicembre, con cui è stato istituito il
Ministero delle risorse agricole, alimentari e forestali,
al termine di un intenso dibattito che aveva visto nella fase intermedia la provvisoria istituzione del Ministero per il coordinamento delle politiche agricole, alimentari e forestali.

Assetto delle Competenze

L'assetto delle competenze in materia agricola in Italia è disciplinato e regolamentato dalle seguenti leggi:

- *legge 16-5-1970,n.281 e successivo D.P.R.15-1-1972, n.11;*
- *legge 22-7-1975,n.382 e successivo D.P.R.24-7-1977, n.616.*

Entrambe trasferiscono alle regioni la maggior parte delle competenze in agricoltura. Sono così diventate materia di intervento regionale tutte le funzioni che più direttamente concernono la realtà produttiva quali:

- *La coltivazione e l'allevamento;*
- *La raccolta, la trasformazione e il commercio dei prodotti;*
- *La divulgazione e la formazione professionale, eccetera.*

Secondo quanto disposto dall'art.4 del D.P.R. n.616/77, "lo Stato... esercita... la funzione di indirizzo e di coordinamento ...e le funzioni, anche nelle materie trasferite o delegate, attinenti ai rapporti internazionali e con la Comunità Europea, alla difesa nazionale, alla pubblica sicurezza".

In particolare nel settore agricolo, le principali competenze statali concernono;

- *Le attività di ricerca, sperimentazione ed informazione di interesse nazionale;*
- *Gli interventi di interesse nazionale per la regolamentazione del mercato agricolo;*
- *La garanzia della sicurezza degli approvvigionamenti;*
- *L'organizzazione del commercio con l'estero;*
- *Il fondo di solidarietà nazionale per le calamità e le avversità atmosferiche.*

Legge 4 dicembre 1993, n. 491

Riordino delle competenze regionali e statali in materia agricola e forestale e istituzione del Ministero delle Riforme Agricole, Alimentari e Forestali.

Sono di competenza delle regioni tutte le funzioni in materia di agricoltura e foreste, di acquacoltura e agriturismo, nonchè le funzioni relative alla conservazione e allo svi-

luppo del territorio.
Il Ministero svolge le funzioni nelle materie relative alle risorse agricole, forestali, agro-alimentari e agro-industriali, all'economia contrattuale (L.88/88), ai mercati agricolo e alimentare, all'acquacoltura e alla pesca marittima, alle competenze statali in materia di agriturismo (L.730/85), in materia veterinaria e zootecnica, alle produzioni dei prodotti elencati nell'Allegato II del trattato istitutivo della CEE, nonchè in materia di opere di raccolta, adduzione e distribuzione primaria delle acque irrigue di rilevanza nazionale.

Il Ministero, nelle materie di cui sopra, svolge le seguenti funzioni: cura le relazioni internazionali e partecipa alla elaborazione delle politiche comunitarie; predispone atti necessari per l'attuazione dei provvedimenti comunitari; definisce le politiche nazionali, compresa la programmazione e le attività di indirizzo e di coordinamento, la raccolta, l'elaborazione e diffusione d'informazione e dati.
La legge istituisce diversi Comitati permanenti specifici preposti alla determinazione degli obiettivi e delle linee generali della politica agricola, alimentare e forestale, da sostenere in ambito nazionale, comunitario e internazionale.

- *Comitato permanente delle politiche agro-alimentari e forestali (art. 2 comma 6);*
- *Comitato permanente per la veterinaria e la zootecnia (art.3);*
- *Comitato permanente di servizi per la trasformazione industriale di prodotti agricoli e forestali (art. 4);*
- *Consulta nazionale per la ricerca agro-alimentare (art. 6 comma 2 lett. D);*

È stabilito per legge che la quota di risorsa finanziaria da attribuire al Ministero per gli interventi per le materie di sua competenza (previste da leggi di programmazione) non può essere superiore al 20%.

È prevista, anche, la riforma del Corpo Forestale dello Stato, della Azienda di Stato per gli Interventi nel Mercato Agricolo-AIMA, dell'Ispettorato Centrale Repressioni Frodi e il riordino degli Istituti di Ricerca e Sperimentazione Agraria e degli altri enti di ricerca vigilati (INEA e ISMEA).

Politica Agraria Comune

Nel corso degli ultimi anni la PAC ha subito mutamenti per adeguarsi alle nuove circostanze nonchè all'evoluzione dei mercati e delle tecnologie.
Notevoli sforzi sono stati infatti compiuti per limitare la sovrapproduzione, per contenere le spese e per evitare un calo del reddito degli agricoltori.
Le prime misure di riforma risalgono al 1979. Di fronte al continuo aumento delle eccedenze lattiero-casearie, si decise di applicare il prelievo di corresponsabilità; nel 1984 vengono stabilite precise quote in fatto di prodotti lattiero-caseari e nel 1988 è introdotta la disciplina degli stabilizzatori che interessa numerosi prodotti agricoli.
Nel mese di giugno del 1992 il Consiglio ha approvato il più radicale pacchetto di riforme per l'agricoltura europea dall'introduzione della Politica Agraria Comune trent'anni prima.

I principali obiettivi della riforma sono i seguenti:

- *far sì che la Comunità conservi la posizione di grande produttrice ed esportatrice agricola, rendendo i suoi agricoltori più competitivi sui mercati interni ed esterni;*
- *ridurre la produzione portandola ad un livello più vicino alla domanda di mercato;*
- *privilegiare nell'assegnazione degli aiuti al reddito gli agricoltori che ne hanno maggior bisogno;*
- *incoraggiare gli agricoltori a rimanere nelle campagne;*
- *tutelare l'ambiente e sviluppare le naturali potenzialità delle zone rurali.*

L'elemento centrale del pacchetto di riforme verte su alcuni prodotti-chiave, per i quali è prevista la riduzione dei prezzi, e sul ritiro dei terreni dalla produzione.
Gli agricoltori saranno direttamente compensati per la perdita di reddito che subiranno. L'intervento riguarda i terreni coltivati a cereali a semi oleosi, i prodotti proteici nonchè le carni bovine.
Anche i prezzi delle carni bovine saranno ridotti del 15% entro tre anni. Tale riduzione sarà compensata da premi supplementari per bovino da carne allevato su pascoli aperti in modo da incentivare la produzione "estensiva", mentre non saranno concessi premi ai produttori che allevano bovini in stalla, compensando tale calo dei prezzi con mangimi di cereali meno cari.
L'elemento caratterizzante nel 1993 è stato l'entrata a regime delle nuo-

ve linee politiche avviate col regolamento 1765/92.

La nuova PAC ha interessato il comparto dei seminativi a partire dalla campagna 1993/94. Detto comparto comprende cereali, semi oleosi e piante proteiche e rappresenta oltre il 10% della produzione lorda vendibile italiana.

La nuova politica di sostegno per queste coltivazioni prevede una graduale diminuzione dei prezzi indicativi e di intervento (in modo da renderli più in linea con quello mondiale), compensata da aiuti diretti al reddito, calcolati come compensazioni per ettaro sulla base di rese storiche differenziate secondo un piano di regionalizzazione del territorio nazionale suddiviso per l'Italia in 254 aree omogenee.

Al fine della determinazione degli aiuti e degli oneri ad essi connessi, i produttori sono stati divisi in due grandi categorie sottoposte a due regimi diversi: i grandi produttori, ai quali si applica il regime generale, ed i piccoli a cui si applica il regime semplificato. I primi sono i produttori che chiedano l'aiuto per una superficie che, in base al piano di regionalizzazione, consente una produzione superiore a 92 tonnellate; i secondi sono i produttori che, in base alle rese del piano di regionalizzazione, chiedano l'aiuto per una superficie che consente una produzione inferiore a 92 tonnellate. La differenza tra i due regimi consiste nel fatto che in quello generale (grandi produttori) la compensazione viene differenziata per colture e vige l'obbligo di mettere a riposo il 15% della superficie per cui si chiede l'aiuto, mentre in quello semplificato (piccoli produttori) la compensazione è unica, indipendente dalle colture, anche se permane l'aiuto

Ritiro dei seminativi nel 1993

	Regime semplificato	Regime generale	Totale
Domande presentate	491.000	44.000	535.000
Superfici cereali (ha)	2.436.000	740.000	3.176.000
Superfici semi oleosi (ha)	21.000	241.000	262.000
Set-aside (ha)	-	210.000	210.000
Totale superficie (ha)	2.488.000	1.208.000	3.696.000
Aiuti regionali (mrd £)	1.150	550	1.700

supplementare a ettaro destinato alla coltivazione di frumento duro nelle aree vocate e non vi è obbligo di set-aside (facoltativo).

In merito a quanto esposto, nel 1993 sono state presentate all'AIMA poco più di 535.000 domande di aiuto. Di queste il 92% del totale riguardano il regime semplificato. Analizzando le singole colture, ha usufruito del regime di aiuti PAC circa l'80% della superficie a frumento duro, con un contributo medio a ettaro di 770.000 lire; il 92% della superficie a mais, con un contributo medio ad ettaro di 383.000 lire; il 59% delle superfici destinate agli altri cereali, con un contributo medio ad ettaro di 233.000 lire.

I produttori di semi oleosi invece hanno aderito massicciamente alla nuova PAC, chiedendo l'aiuto per la totalità della superficie coltivata, ed hanno optato prevalentemente per il

Applicazione di vari sistemi di set-aside (000 ha)

Paesi	Area di base	Set-aside quinquennale	Set-aside obbligatorio (ha)	% sul totale
EU	48.644	1 .522	4.659	100,0
Belgio	478	1	19	0,4
Danimarca	2.017	7	205	4,4
Germania	9.821	415	1.063	22,8
Grecia	1.492	1	17	0,4
Spagna	9.229	95	909	19,5
Francia	13.522	214	1 .581	33,5
Irlanda	345	2	24	0,5
Italia	5.800	639	210	4,4
Lussemburgo	43	-	2	-
Paesi Bassi	436	15	8	0,2
Portogallo	1.054	-	70	1,5
Regno Unito	4.407	133	556	11.9

regime generale: ben il 92% della superficie investita a semi oleosi è stata coltivata in regime generale, con la conseguenza messa a riposo del 15% dei terreni.

In materia di set-aside, complessivamente, è stato messo a riposo fra regime semplificato (facoltativo) e regime generale (obligatorio), solo il 5,2% delle superfici per le quali è stata chiesta la compensazione.

La riforma della PAC ha anche determinato il passaggio di buona parte della superficie sottratta alla produzione in base al programma quinquennale di set-aside (Reg. CEE 1094/88) e allo schema di set-aside obbligatorio previsto dal Reg. 1765/92.

In quasi tutta l'Unione Europea l'area ritirata dalla produzione in base al programma volontario quinquennale è diminuita, con l'eccezione dell'Italia dove invece si è accresciuta. Tre paesi - Francia, Germania e Spagna - ricoprono circa il 70% dell'area totale a seminativi (area di base) ed il 75% del set-side.

Il cambiamento dei meccanismi di mercato dei singoli prodotti è stato affiancato da una serie di "misure di accompagnamento" per:

- *sviluppare l'agricoltura ecocompatibile, mediante un minor impiego di pesticidi e fertilizzanti (Regolamento 2078/92)*
- *favorire il prepensionamento degli agricoltori di età pari o superiore ai 55 anni per dare spazio a giovani imprenditori agricoli (Regolamento 2079/92)*
- *finanziare programmi di rimboschimento e gestire razionalmente i terreni ritirati dalla produzione (Regolamento 2080/92).*

Sono in attesa dell'approvazione della Comunità i piani regionali che tutte le regioni hanno provveduto a mettere a punto per il Reg. 2078/92 e 2080/92 (*) nel corso del 1993. Per il Reg. 2079/92 è stato elaborato un programma nazionale di concerto tra le Regioni e il Ministero delle risorse agricole e forestali, trasmesso alla UE nel mese di luglio ed i cui risultati si vedranno nel 1994.

(*) In data 8 aprile 1994, il Comitato Permanente Forestale ha esaminato favorevolmente i programmi regionali operativi relativi al Reg. 2080/92, presentati da: Valle d'Aosta, Piemonte, Lombardia, Liguria, Provincia Autonoma di Bolzano, Veneto, Friuli Venezia Giulia, Emilia Romagna, Marche, Umbria, Toscana, Lazio, Abruzzo, Molise, Campania, Puglia, Calabria, Sicilia e Sardegna. La spesa complessiva degli investimenti (quote comunitarie più quote nazionali), nel periodo 1994-1997, è stimata in circa 1.000 miliardi di lire.

Principali regolamenti strutturali della CEE

AGRICOLTURA

2328/91 *(*)*	miglioramento dell'efficienza delle strutture agrarie
2078/92	metodi di produzione agricola compatibili con la protezione dell'ambiente
2079/92	aiuti al prepensionamento in agricoltura
2080/92	aiuti misure forestali nel settore agricolo
2088/85	programmi integrati mediterranei
2052/88	missioni dei Fondi a finalità strutturale, loro efficacia e coordinamento dei loro interventi e di quelli della BEI e degli altri strumenti finanziari esistenti
866/90	miglioramento delle condizioni di commercializzazione e di trasformazione dei prodotti agricoli
867/90	miglioramento delle condizioni di commercializzazione e di trasformazione dei prodotti della silvicoltura
1401/86	azione comune per il miglioramento dell'agricoltura in alcune zone svantaggiate dell'Italia settentrionale
768/89	aiuti transitori al reddito agricolo
1360/78	associazioni di produttori e relative unioni
1035/72	organizzazioni di produttori nel settore degli ortofrutticoli

Misure per il controllo delle produzioni

1442/88	premi per l'abbandono definitivo delle superfici viticole
822/87 e 2741/89	aiuti nazionali all'impianto di superfici viticole
1200/90	risanamento della produzione comunitaria di mele
2066/92	premi allevamenti bovini da carne e da latte
1336/86	indennita' per l'abbandono definitivo della produzione lattiera
3493/90	premi allevamenti pecore e capre

PESCA E ACQUACOLTURA

4028/86	miglioramento delle strutture nel settore della pesca e dell'acquacoltura
4042/89	miglioramento delle condizioni di trasformazione e di commercializzazione dei prodotti della pesca e dell'acquacoltura

(*)che codifica il 797/85 e successive modifiche

Fondi Strutturali per l'Agricoltura '94-'99

Il 20 luglio 1993, il Consiglio dei Ministri CEE ha promulgato sei regolamenti sulla base delle riforme avviate dalla Comunità nel 1992, in materia di Politica agricola comune, destinati a disciplinare i fondi strutturali per il periodo 1994-1999.

I fondi strutturali della Comunità sono i seguenti:

- *Regolamento CEE n.2080/93 del Consiglio, disposizioni d'applicamento del regolameto CEE n. 2052/88 per quanto riguarda lo Strumento finanziario della pesca (SFOP).*
- *Regolamento-quadro n. 2081/93, modifica il regolamento CEE n.2052/88 relativo alle missioni dei Fondi a finalità strutturali, alla loro efficacia e al coordinamento dei loro interventi e di quelli della Banca europea per gli investimenti e degli altri strumenti finanziari esistenti.*
- *Regolamento CEE n. 2082/93, modifica il regolamento CEE n. 4253/88 recante disposizioni di applicazione del regolamento CEE n.2052/88 per quanto riguarda il coordinamento tra gli interventi dei vari Fondi strutturali, da un lato, e tra tali interventi e quelli della Banca europea per gli investimenti e degli altri strumenti finanziari esistenti, dall'altro.*
- *Regolamento CEE 2083/93, modifica il regolamento CEE n.4254/88 recante disposizioni di applicazione del regolamento CEE n.2052/88 per quanto riguarda il Fondo europeo di sviluppo (FESR).*
- *Regolamento CEE n.2084/93, modifica il regolamento CEE n.4255/88 recante disposizioni di applicazione del regolamento CEE n.2052/88 per quanto riguarda il Fondo europeo di sviluppo regionale (FSE).*
- *Regolamento CEE n.2085/93, modifica il regolamento CEE n. 4256/88 recante disposizioni d'applicazione del regolamento CEE n. 2052/88 per quanto riguarda il FEAOG, sezione orientamento.*

L'obiettivo della Comunità è quello di rinsaldare la propria coesione economica e sociale, contribuendo nel contempo al riequilibrio regionale comunitario.
Nelle proposte di modifica dei regolamenti sono stati indicati gli obiettivi prioritari che la Comunità intende finanziare con i fondi struttu-

rali disponibili (vedi tabella) e i criteri che seguirà per l'erogazione di tali fondi, messi a disposizione degli Stati membri per un periodo di sei anni.

È possibile la combinazione dei fondi strutturali; la BEI contribuisce, attraverso la concessione di prestiti per il conseguimento dei cinque obiettivi.

I fondi possono co-finanziare programmi operativi, sovvenzioni globali, nonchè affiancarsi ai regimi di aiuti nazionali compatibili con la politica CEE e possono essere utilizzati per la concessione di sussidi all'assistenza tecnica e agli studi preparatori.

Il Ministero per le risorse agricole, alimentari e forestali, di concerto con le Regioni interessate, si è attivato per la ricezione delle indicazioni comunitarie in merito agli aspetti di interesse agricolo.

Politica strutturale nella Comunità: obiettivi e strumenti

Obiettivi	Fondi utilizzabili
Obiettivo 1	FESER FSE FEAOG/ Orientamento
Promuovere lo sviluppo e l'adeguamento strutturale delle regioni in cui lo sviluppo è in ritardo	
Obiettivo 2	FESR FSE
Riconvertire le regioni o parti di esse gravemente colpite dal declino industriale	
Obiettivo 3	FSE
Lottare contro la disoccupazione di lunga durata, facilitare l'inserimento dei giovani e l'integrazione nel mercato del lavoro delle persone minacciate di emarginazione sociale	
Obiettivo 4	FSE
Agevolare l'adeguemento dei lavoratori ai mutamenti industriali e all'evoluzione dei sistemi di produzione	
Obiettivo 5	a- FEAOF/Orientameto SFOP b- FEAOG/Orientamento FSE,FESR
Promuovere lo sviluppo rurale a- accelerando l'adeguamento strutturale nell'ambito della riforma della PAC b- agevolando l'adeguemento strutturale delle zone rurali	

Fondi strutturali comunitari

Le aree meritevoli degli interventi comunitari a titolo dell'obiettivo 1 per il periodo 1994/99 del nostro paese sono: Abruzzo (fino al '96), Basilicata, Calabria, Campania, Molise, Puglia, Sardegna e Sicilia. Invece usufruiscono degli strumenti finanziari dell'obiettivo 5 i territori comunali italiani del centro-nord, attraverso programmi di sviluppo rurale.

Stabilizzatori agricoli

Per ripristinare l'equilibrio sui mercati e ridurre i problemi di bilancio, la Comunità ha introdotto dal 1988 meccanismi di limitazione noti come stabilizzatori agricoli.
Essi operano, per tutti i prodotti soggetti ad organizzazione comune di mercato, riducendo automaticamente il sostegno qualora vengano superati determinati quantitativi massimi garantiti (QMG) oppure superfici massime garantite (SMG).

QMG e SMG per principali prodotti della campagna 1992/93

QMG	Zucchero *(1)*		
	Quota A		11.187
	Quota B		2.488
	Tabacco *(2)*		390
	Olio di oliva		1.350
	Arance *(3)*		1.179
	Pesche *(3)*		280
	Mele *(3)*		282
	Prodotti trasformati *(4)*		
	Concentrati	EUR 11	4.284
		Germania	33,7
	Pelati		1.543
	Altri	EUR 11	735
		Germania	1,3
	Latte		101.672
SMG	Girasole	EUR 10	1.202
		Spagna	1.411
		Portogallo	122
	Soia		509

QMG=Quantità Massima Garantita (000 t) SMG=Superficie Massima Garantita (000 ha)
(1) Equivalente zucchero bianco (2) Tabacco in foglie (3) Limite d'intervento (4) Limite di garanzia

Accordo GATT *

Alla fine del 1993 è stato ratificato, dopo diversi anni di negoziati, l'accordo generale sul commercio internazionale, denominato Uruguay Round, che presenta importanti novità per il settore agricolo.

I contenuti generali dell'accordo sono:

- *Costituzione di un'Organizzazione Mondiale del Commercio (OMC) che di fatto trasforma il GATT da semplice accordo e organismo operativo.*
- *Riduzione delle tariffe doganali, materia "classica" del GATT, sulle importazioni di prodotti industriali.*
- *Assoggettamento di nuove materie agli accordi GATT e alla disciplina dell'OMC.*

Per quanto concerne l'agricoltura gli obiettivi dell'accordo riguardano la creazione di un sistema commerciale di prodotti agricoli equo e rispondente alle necessità del mercato, che rispetti le esigenze dei paesi in via di sviluppo e tuteli i paesi importatori netti che risultino penalizzati dalle variazioni dei prezzi.
L'accordo verte essenzialmente su 5 punti:

- *riduzione delle sovvenzioni e dei sussidi diretti alle esportazioni: in sei anni dovrà calare almeno del 21% il volume di esportazioni sovvenzionato e del 36% il suo valore*
- *mantenimento dei sostegni interni che non producono effetti rilevanti sul commercio internazionale non avendo effetti sul prezzo finale (es. sostegni diretti al reddito dei coltivatori o incentivi all'abbandono di terreni coltivati). Gli altri sussidi interni dovranno subire una riduzione del 20%*
- *eliminazione delle quote alle importazioni, attraverso una trasformazione in tariffe equivalenti che dovranno poi essere calate del 36% in 6 anni (24% in 10 anni i PVS)*
- *clausola di pace (9 anni) per evitare ritorsioni unilaterali*
- *aiuti alimentari e sovvenzioni per i paesi "perdenti" del Round, ovvero i paesi in via di sviluppo importatori netti di prodotti i cui prezzi aumentassero in seguito alla liberizzazione*

La riforma della PAC, che è stata anche frutto delle pressioni proveniente dalle trattative GATT ha anticipato in un certo senso alcune misure dello stesso accordo.

(*) General Agreement on Tariffs and Trade

Legge 752/86 (*) e 201/91

Nel 1993, come già a partire dal 1986, l'intervento finanziario nel settore è stato condotto prevalentemente attraverso la legge 752/86, cioè col suo differimento biennale, legge 201 del 10 luglio 1991.
In data 13 luglio 1993 il CIPE, su proposta del Ministero, ha assegnato 1.781 miliardi, ripartiti tra il Ministero, le Regioni a statuto ordinario e speciale e le Provincie autonome.

(*) Legge n. 752 del 8 Novembre 1986 "Legge pluriennale di spesa per gli interventi programmati nel settore agricolo".

Finanziamenti erogati dalla legge 752/86

Delibera CIPE	Stanziamenti (mrd. £)
17 Dicembre 1986	2.765
23 Aprile1987	2.993
14 Giugno 1983	3.250
2 Maggio 1989	3.292
15 Maggio 1990	3.029
2 Agosto 1991	3.052
31 Gennaio 1992	1.000
13 Luglio 1993	1.781

Piano forestale nazionale

Previsto dall'art. 2 della Legge 752/86 è stato approvato dal CIPE nel dicembre 1987.
Tra gli obiettivi vi sono la promozione di Consorzi di gestione forestale, misure a sostegno delle imprese che riguardano lo sviluppo tecnologico e la manutenzione e sviluppo delle foreste, una politica di miglioramento delle infrastrutture, la promozione dei parchi urbani.

Legge 183/87

Garantisce il finanziamento dei regolamenti CEE attraverso l'istituzione di un fondo di rotazione presso il Ministero del Tesoro.
In data 13 luglio 1993 il CIPE ha deliberato, in merito a detta legge, ripartendo 660 miliardi di lire.

Legge 88/88

Riguarda gli accordi interprofessionali ed i contratti di coltivazione e vendita dei prodotti agricoli destinati alla trasformazione o alla commercializzazione.
La legge si propone di disciplinare l'offerta in modo da adeguarla alla

domanda dei mercati interni ed esteri, di migliorare la qualità dei prodotti, di stabilire i criteri e le condizioni generali di produzione e vendita e di prestazione dei servizi, di fissare in anticipo i prezzi dei prodotti o i criteri per la loro determinazione.
Il Ministero può intervenire per la stipula degli accordi che, in particolare, stabiliscono il prodotto oggetto dell'accordo, le modalità e i tempi di consegna, il prezzo minimo, le modalità ed i tempi di pagamento, quantitativi e requisiti qualitativi, tempi di stipula dei contratti.

Legge 87/90

Il 9 aprile '90 è stata approvata la legge n. 87 "che promuove interventi urgenti per la zootecnia" volti al risanamento ed alla ristrutturazione della produzione e della commercializzazione nel settore e per il loro adeguamento alle esigenze di mercato.

Per tali finalità è stato istituito presso il Ministero un fondo quinquennale al quale è attribuita una dotazione di 340 miliardi.

Legge 181/82

"Disposizione per la formazione del bilancio annuale e pluriennale dello Stato". Ha istituito il Fondo Investimento Occupazione (FIO) gestito dal Ministero del Bilancio. Per i progetti agricoli è stato istituito un comitato consultivo di raccordo operante all'interno del Ministero.

Legge 185/92

Il 14 febbraio è stata approvata la legge n. 185 riguardante la "Nuova disciplina del Fondo di Solidarietà Nazionale", già istituito con la legge 364/70.
Da tale fondo vengono prelevate somme occorrenti per far fronte ai danni derivati da calamità naturali o da avversità atmosferiche di carattere eccezionale alle infrastrutture, alle strutture aziendali o alla produzione agricola delle zone interessate, ad esclusione di quella zootecnica.
Le misure previste sono: a titolo di pronto intervento (erogazioni di un contributo una tantum a parziale copertura del danno); contributi in conto capitale; prestiti, a tasso agevolato, per la ricostruzione dei capitali di conduzione; prestiti di esercizio, ecc.

Per effetto di tale legge la dotazione di detto Fondo, intestato al Ministero, è stata incrementata di 170 miliardi di lire per ciascuno degli anni '92, '93 e '94. In particolare per l'esercizio finanziario 1993 è stata impegnata la somma di lire 390 miliardi per interventi compensativi dei danni alle aziende agricole e lire 280 miliardi per i contributi di difesa alle colture agrarie.

APPENDICE

Glossario

Consumi intermedi agricoli
L'aggregato di spesa delle aziende agricole per sementi, concimi, antiparassitari ed altre spese per il bestiame, energia, acqua irrigua e servizi vari.

Contoterzismo
Manodopera fornita da imprese di esercizio e noleggio per conto terzi con o senza utilizzazione di mezzi meccanici ed attrezzatura di uso agricolo.

Contributi alla produzione
Premi ed integrazioni erogati dagli enti pubblici a sostegno del settore agricolo.

Costi fissi
Includono gli oneri sostenuti per l'impiego di fattori che esauriscono la loro durata in più anni: ammortamenti, interessi, affitto terreni, compensi per lavoratori dipendenti fissi.

Costi variabili
Corrispondono alla sommatoria dei costi sostenuti per l'impiego dei fattori a logorio totale, cioè: sementi, concimi, antiparassitari, energia, noleggi, compensi per lavoro avventizio.

Forma di conduzione

- *conduzione diretta*
- *conduzione con salariati e/o compartecipanti*
- *conduzione a colonia parziaria appoderata (mezzadria)*

OTE
Orientamento Tecnico Economico
La classificazione delle aziende agricole per OTE si basa sulla determinazione del peso economico delle varie attività produttive presenti in azienda e sulla loro combinazione.
A tal fine, utilizzando i RLS della zona in cui ricade l'azienda, si moltiplicano gli ettari coltivati o il numero dei capi allevati per il corrispondente RLS.
La combinazione ottenuta si confronta con uno schema tipologico che serve ad individuare gli OTE secondo criteri definiti a livello comunitario e validi per tutte le statistiche ufficiali.
Un'azienda viene detta specializzata quando il RLS di un'attività o di più attività affini supera i 2/3 del RLS totale dell'azienda.

PIL
Prodotto Interno Lordo
Rappresenta il risultato finale dell'attività svolta dalle unità produttive che operano nel territorio economico del Paese. È costituito dal valore complessivo dei beni e servizi prodotti all'interno di un certo territorio, durante un determinato periodo di tempo (di solito un anno solare). Non comprende il valore dei beni e servizi intermedi.

PLV
Produzione Lorda Vendibile

È quella che può essere venduta dall'azienda ed è pertanto uguale a quella raccolta meno la quota-parte riutilizzata nell'azienda stessa come mezzo di produzione.

RLS
Reddito Lordo Standard

Si tratta di un parametro determinato per ciascuna attività produttiva aziendale mediante differenza tra la produzione vendibile e l'importo di alcuni costi specifici (sementi, concimi, antiparassitari, mangimi, foraggi, ecc.) esclusi quelli per l'impiego della manodopera e delle macchine. I redditi lordi così determinati vengono definiti "standard" in quanto la produzione vendibile ed i costi sono calcolati su una media triennale e con riferimento alla zona altimetrica di ogni regione. I RLS sono espressi in Unità di Conto Europea (ECU) ed aggiornati dall'INEA in occasione delle indagini strutturali e dei censimenti condotti dall'ISTAT. L'ammontare dei RLS corrispondenti alle attività produttive aziendali equivale alla dimensione economica dell'azienda ed è espressa in UDE.

Reddito netto

Rappresenta la remunerazione di tutti i fattori di proprietà dell'imprenditore agricolo: terra, lavoro e capitale.

SAU
Superficie Agricola Utilizzata

Costituita dall'insieme dei seminativi, prati permanenti e pascoli, coltivazioni legnose agrarie, orti familiari e castagneti da frutto.

Superficie totale aziendale

Per le indagini strutturali sulle aziende agricole, intendesi l'insieme della SAU, delle colture boschive (boschi e pioppete), della superficie agraria non utilizzata e dell'altra superficie rientrante nel perimetro dei terreni aziendali. Essa, pertanto, differisce da quella adottata dalle statistiche agricole correnti in quanto quest'ultima comprende anche gli altri terreni abbandonati, non facenti parte di aziende agricole.

Titolo di possesso della SAU

Rapporto tra impresa e capitale fondiario. Si specifica in:

- *proprietà*
- *affitto.*

UDE
Unità di Dimensione Europea

Per il calcolo dei RLS, ogni unità equivale, per il 1987, a 1.200 ECU, vale a dire 1.671.600 (1 ECU=lire 1.393). Così un'azienda il cui RLS globale è di 7.850 ECU, ha una dimensione economica di 6,54 UDE.

ULA
Unità Lavorativa-Anno

Secondo la definizione comunitaria, per le indagini strutturali l'ULA equivale al contributo lavorativo di una persona che lavora almeno per 2.200 ore nel corso di un anno.

VA
Valore Aggiunto

L'aggregato risultante dalla differenza tra il valore di beni e servizi conseguita dalle singole branche produttive ed il valore dei beni e servizi intermedi consumati nel periodo considerato.
Corrisponde alla somma delle retribuzioni e degli ammortamenti di ciascun settore.

Il valore aggiunto al costo dei fattori comprende gli eventuali contributi correnti versati dall'amministrazione pubblica ai diversi settori ed esclude le imposte indirette.
Viceversa, nel calcolo del valore aggiunto ai prezzi di mercato, sono comprese le imposte indirette ed esclusi i contributi alla produzione.

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Calabria
Via S.Nicola, 5 - Catanzaro
Campania
Via Oberdan, 32 - Napoli
Emilia Romagna
Via Aldo Moro, 38 - Bologna
Friuli-Venezia Giulia
Via Caccia, 17 - Udine
Lazio
Via Rosa Raimondi Garibaldi, 7 - Roma
Liguria
Via Fieschi, 15 - Genova
Lombardia
Piazza IV Novembre, 5 - Roma
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Corso Mazzini, 148 - Ancona
Molise
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Piemonte
Corso Stati Uniti, 21 - Torino
Puglia
Lungomare N. Sauro, 1 - Bari
Sardegna
Via Pessagno, s.n. - Cagliari
Sicilia
Viale Regione Siciliana
ang. Via Leonardo da Vinci - Palermo
Toscana
Via Novelli, 26 - Firenze
Trentino-Alto Adige
Provincia Autonoma di Trento
località Melta, 112 - Trento
Provincia Autonoma di Bolzano
Via Brennero, 6 - Bolzano
Valle d'Aosta
Quart - loc. Amerique, 127/a - Aosta
Veneto
Via Torino, 110 - Mestre

ENTI DI RICERCA DI INTERESSE NAZIONALE
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Piazzale Aldo Moro, 1
***ENEA** - Roma*
Via Regina Margherita, 125
***INEA** - Roma*
Via Barberini, 36
***ISTAT** - Roma*
Via Cesare Balbo, 16
***ISMEA** - Roma*
Via Nomentana, 183
***INN** - Roma*
Via Ardeatina, 546
INFS
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Ozzano Emilia - Bologna
Via la Fornacetta, 9

ISTITUTI DI RICERCA E SPERIMENTAZIONE AGRARIA

Ist. Sper. Agronomico
Bari - Via Celso Ulpiani, 5
Ist. Sper. per l'Agrumicoltura
Acireale (CT) - Corso Savoia, 190
Ist. Sper. per l'Assestamento Forestale e l'Apicoltura
Trento (Villanzano) - Via Giordano, 8
Ist. Sper. per la Cerealicoltura
Roma - Via Cassia, 176
Ist. Sper. per le Colture Foraggere
Lodi (MI) - Viale Piacenza, 25
Ist. Sper. per le Colture Industriali
Bologna - Via di Corticella, 133
Ist. Sper. per la Elaiotecnica
Pescara - Via Cesare Battisti, 229
Ist. Sper. per l'Enologia
Asti - Via Pietro Micca, 35
Ist. Sper. per la Floricoltura
Sanremo (IM) - Corso degli inglesi, 508
Ist. Sper. per al Frutticoltura
Roma (Ciampino) - Via Fioranello, 52
Ist. Sper. Lattiero Caseario
Lodi (MI) - Via A. Lombardo, 14
Ist. Sper. per la Meccanizzazione Agricola
Monterotondo (Roma)
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Firenze - Piazza D'Azeglio, 30
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Eboli (Salerno)
CIFDA Metapontum
Basilicata-Calabria-Puglia
c/o Azienda Jonica,km448, 200
Metaponto di Bernalda (Matera)

CIFDA Italia Centrale
c/o Centro Mancini
Via Cupa, 18
S. Eraclio di Foligno (PG)

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c/o Assessorato Agricoltura
Regione Sardegna
Via Emanuele Pessagno (CA)
Sede per la Sicilia
Hotel Azzolini Palm Beach
Terrasini - Palermo

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Azienda di Stato per gli Interventi nel mercato Agricolo
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Consorzio Nazionale per il Credito Agrario di Miglioramento
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Roma - Salita Poggio Laurentina, 7
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1 Belgio
2 Danimarca
3 Francia
4 Germania
5 Grecia
6 Irlanda
7 Italia
8 Lussemburgo
9 Paesi Bassi
10 Portogallo
11 Regno Unito
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00187 Roma
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MINISTERO DELLE RISORSE AGRICOLE ALIMENTARI E FORESTALI

Italian agriculture in figures 1995

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1995

ISTITUTO NAZIONALE DI ECONOMIA AGRARIA

NORTH
1 Valle d'Aosta
2 Piemonte
3 Lombardia
4 Trentino Alto Adige
5 Veneto
6 Friuli Venezia Giulia
7 Liguria
8 Emilia Romagna

CENTRE
1 Toscana
2 Umbria
3 Marche
4 Lazio

SOUTH
1 Abruzzo
2 Molise
3 Campania
4 Puglia
5 Basilicata
6 Calabria
7 Sicilia
8 Sardegna

MINISTERO DELLE RISORSE AGRICOLE, ALIMENTARI E FORESTALI

Italian agriculture in figures 1995

INEA

Walter Luchetti
Minister for Agricultural, Food and Forestry Resources

Economic recovery was experienced in all industrialised countries during 1994.It also affected the entire agro-industrial system in Italy, which at present contributes 15% of Gross Domestic Product and plays an important role as far as employment is concerned.

The ending of the protectionist isolation which the Common Agricultural Policy had guaranteed to agriculture, together with the progressive internationalisation of markets, has made strongly evident the problem of our competitive capacity on the international scene. Stimulated by demand and by changes in the socio-economic context within the sector, a process of re-organisation is under way which is affecting agricultural structures, the other sectors in the agro-food chain as well as the relationships between the market for products and the market for factors of production;it points clearly to the importance of the role of the institutions in regulating this process.

It is therefore with great pleasure that I present the new edition of this informative booklet prepared by INEA, which explains very clearly the role and potential of our agro-food system.

Unless otherwise indicated,
all statistical data contained in the text are derived
from ISTAT and INEA sources.
For international comparisons
EUROSTAT data has been used

Data contained in this publication can be consulted on
VIDEOTEL, page 2788
It may be quoted provided the source is acknowledged

THE ECO-SYSTEM

Climate *

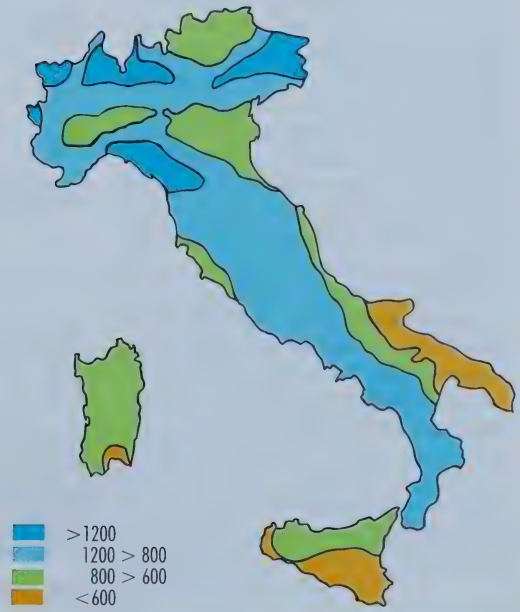
Average temperature of the coldest month (°C) (January)

Average temperature of the warmest month (°C) (July)

(*) Thirty year averages. Source: SIAN-UCEA Rome.

Hours of sunshine per year

Total rainfall per year (mm)



Territory, Population and Economy

An important feature of the Italian national territory is the predominance of hilly and mountainous areas. Over a total area of about 30 million hectares, plains account for only 23%; this figure falls to 18% in the South and to 9% in the Centre. In recent years, demographic growth has been maintained almost completely by foreign immigration whilst the natural growth rate of the Italian population continues to be very low, if not actually zero.
In 1994 there was a decrease in population in the North of 0.5 per thousand as compared with 1993 whereas in the South there was an increase of 5.1 per thousand.

Territory and Population

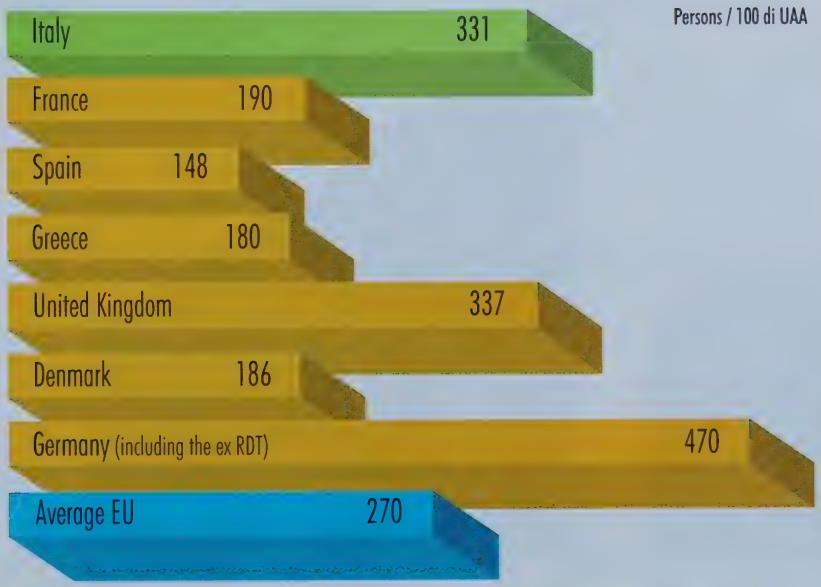
Districts	Total area km²	Agricultural area %	Population 000 units	Density no./km²	Work force 000 units
North	119.894	42,5	25.420	212	11.083
Centre	58.369	46,1	10.979	188	4.475
South	123.060	56,1	20.848	169	7.243
Italy	301.323	48,8	57.247	190	22.801

Territory by altimetric zone (000 ha) (1)

Zone	North	Centre	South	Italy
Mountains	5.530	1.578	3.503	10.611
Hills	2.272	3.724	6.548	12.544
Plains	4.187	535	2.255	6.977
TOTAL	11.989	5.837	12.306	30.132

(1) Area at 31-12-1994.

Ratios of population to agricultural area (1994)



The agricultural area and the availability of land

The process of urbanisation is progressively absorbing land in Italia. Unproductive areas, mainly residential and for infrastructure, are increasing and are estimated at about 2.8 million hectares or 9% of national territory.The agricultural area, on the other hand, is continuously decreasing: since 1970 the agricultural area utilised diminished by 2.8 million hectares (-16%) according to data from the most recent survey of farm structures. This is a phenomenon which affects all developed and newly industrialised countries. Land is thus becoming an ever-more precious resource, especially in countries which, like Italia, have a high population density and where national territiry is subject to considerable variations in altitude.

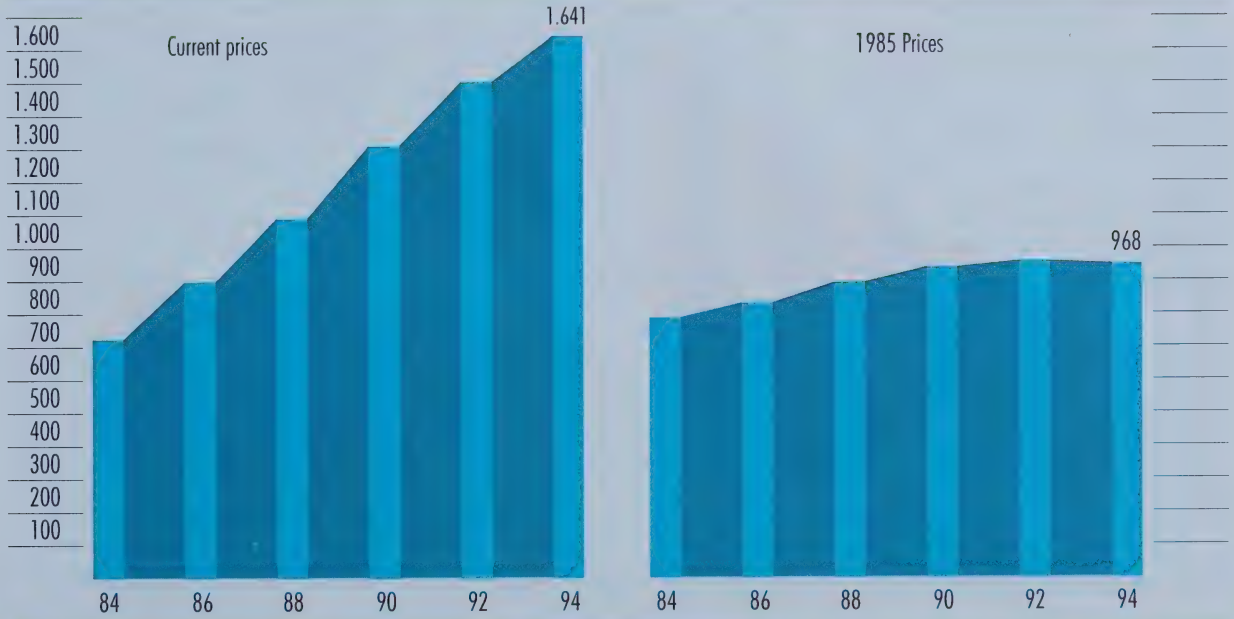
Land use in Italy and EEC countries (%)

	Italy	(*) Other mediterranean countries	(**) Other EU	Total EU
Arable land *(1)*	29,6	27,9	30,5	29,6
Permanent crops *(2)*	11,0	9,2	1,1	4,9
Vegetable gardens	0,3	-	0,2	0,2
Permanent meadows and pastures	15,0	11,6	25,1	19,7
Woodland	21,3	33,5	22,1	25,5
Inland waterways	2,4	1,2	1,7	1,7
Unproductive areas and other land *(3)*	20,4	16,6	19,3	18,4
TOTAL AREA (000 ha)	30.132	72.872	133.816	236.820

(*) Greece, Spain, Portugal.
(**) France, Germany including ex GDR, Benelux, Denmark, Ireland, Great Britain .
(1) Including temporary forage crops and set aside.
(2) Tree and other permanent crops.
(3) Civic and industrial settlements, infrastructure, rocks and barren land: abandoned and uncultivated land, ornamental parks and gardens, farm land under buildings and road are included under other headings.

Gross Domestic Product

Gross domestic product 1984-1994 (trillion lire)



GDP per capita and per work unit, 1984-1994 (million lire)

Agriculture and the Environment

Consideration of the relationship between agriculture and the environment involves, above all, a discussion of the evolution of the environmental policy of the EU. The latter has undergone a particularly rapid development in recent years, beginning with the addition of the Environmental Protocol to the Single European Act of 1986 which confirms the need for common action for conservation of the environment.

The three preceding Programmes for Environmental Action (1973-76, 1977-81, 1982-86) already contained some guidelines for an environmental policy within the EU which still remain valid, but it is, however, the Single Act which lays the juridical basis for intervention in the environment, supplying a framework of reference for the various types of unilateral action.

An important element in the new treaty is the obligation to consider protection of the environment as an essential component of all other EU policies in an integrated approach which has become even more evident in the Fourth (1987-92) and Fifth (adopted in 1993) Programmes for Environmental Action.

With specific reference to the agricultural sector, and in spite of various Community provisions specific to the environment in the 1970s and 1980s, the EEC Regulation 797/85 is the first legislative measure which links agricultural policy to safeguard of the environment.The primary objective here, however, is the limitation of surplus agricultural production.

A whole series of measures stem from this which are linked with wider objectives of agricultural policy but which favour environmental protection through incentives for low impact methods of agricultural production, for reconversion, extensive farming and set-aside. Amongst them are to be found structural and territorial provisions such as Regulations 2052/88, 4253/88 and 2328/91.

Regulation 2092/91, later modified by Reg. 2083/92, on the other hand, has a direct influence on agriculture, dealing with organic farming. Although no financial measures are foreseen, the role of organic farming in safeguarding and preserving the rural environment is recognised with the definition of a normative framework for production and marketing of organic products.

In the context of recent measures accompanying the reform of the Common Agricultural Policy, Regulation 2078/92 opens the way for direct aid to farmers and serves to

introduce or maintain methods of agricultural production compatible with the needs of environmental protection and nature conservation. The Regulation has been implemented over the whole country on the basis of multi-year Regional programmes.

Amongst other recent initiatives of the European Union which directly or indirectly affect the primary sector, particular mention must be made of:

- *Reg. 2080/92 which initiates a Community regime of aid to forestry in the agricultural sector. The premia and incentives to forestry plantings have the dual objectives of protecting the environment and of putting a brake on agricultural production;*
- *Reg. 1973/92 which introduces a financial measure in favour of the environment (LIFE). An allocation of 400 million ECU is foreseen for the period 1991-95 for all actions contributing to the development and application of Community policy and legislation for the environment following the principles of polluter pays and of subsidiarity;*
- *Directive 43/92 concerning the preservation of natural and semi-natural habitats of wild flora and fauna. The main objective of the Directive is that of preserving biodiversity through maintenance or restoration of habitats and of species of animals or plants. For this purpose special areas of conservation are to be identified which will constitute a European ecological network (Natura 2000).*
- *the programme of initiatives such as LEADER II, emanated in 1994 and adopted by the regions with their own programmes, promotes initiatives for rural development. Great emphasis is laid on agriculture with low environmental impact, on crops for energy production, on measures for protecting the environment and on rural tourism.*
- *at national level, besides the norms relating to Community regulations, mention must be made of the framework Law 394/91 for protected areas promoted by the Ministry for the Environment, which also regulates agricultural activities in protected areas, and of the First Three-year Programme of 21.10.93 which finances the implementation of the law 394/91.*

Protected areas 000 ha

National parks 1.380
Regional areas to be set up 713
Regional nature parks 618
Nature reserves and land 79
Regional nature reserves 63
Wetlands 9

Protected areas

Five national parks were set up in Italy some time ago. They are:

- *Gran Paradiso 70.000 ha*
- *Stelvio 134.620 ha*
- *Abruzzo 40.000 ha*
- *Circeo 8.400 ha*
- *Calabria 15.435 ha*

The establishment of the following national parks has been deliberated under the Financial Law for 1988:

- *Dolomiti Bellunesi 25. 000 ha*
- *Monti Sibillini 75.000 ha*
- *Pollino 176.000 ha*
- *Parco marino golfo di Orosei 220 square km*

The three year Plan of the Ministry for the Environment provides for the establishment of the national park of Aspromonte (99,000 ha) and for the following inter-regional parks:

- *Delta del Po 1.000 ha*
- *Foreste Casentinesi 17.650 ha*
- *Arcipelago Toscano 2.500 ha on land and 65 ha of sea*

The following national parks have been established by the law no. 394/91:

- *Gran Sasso*
- *Monti della Lega*
- *Gargano*
- *Vesuvio*
- *Maiella*
- *Cilento e Vallo di Diano*

State-protected areas by Region, 1994 (ha)

Regions	Areas	% reg. area	Composition %	ha/100 inhabitants
Piemonte	175.654	6,9	6,2	4,2
Valle d'Aosta	41.697	12,8	1,5	35,6
Lombardia	505.224	21,2	17,7	5,7
Bolzano	168.658	22,8	5,9	38,0
Trentino	103.115	16,6	3,6	22,8
Veneto	77.777	4,2	2,7	1,8
Friuli V.G.	45.398	5,8	1,6	3,8
Liguria	62.279	11,5	2,2	3,7
Emilia Romagna	123.731	5,6	4,3	3,2
Toscana	128.988	5,6	4,5	3,7
Umbria	17.424	2,1	0,6	2,1
Marche	74.871	7,7	2,6	5,2
Lazio	124.360	7,2	4,4	2,4
Abruzzo	338.794	31,4	11,9	27,0
Molise	5.606	1,3	0,2	1,7
Campania	236.772	17,4	8,3	4,2
Puglia	122.029	6,3	4,3	3,0
Basilicata	93.346	9,3	3,3	15,3
Calabria	194.971	12,9	6,8	9,4
Sicilia	200.243	7,8	7,0	4,0
Sardegna	14.328	0,6	0,5	0,9
ITALY	2.855.265	9,5	100,0	5,0

The Use of Chemicals

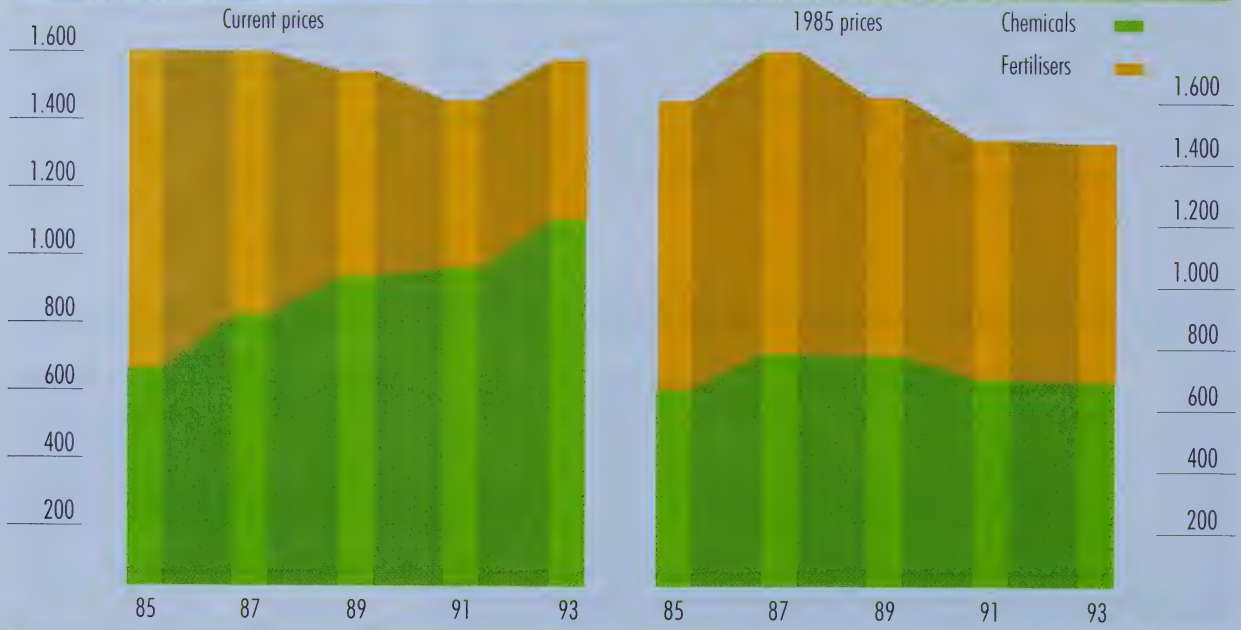
In recent decades there have been considerable increases in agricultural productivity, made possible, amongst other things, by greater use of chemicals.This, in many cases, has undoubtedly undermined the positive contribution of agriculture to environmental protection.More recently, however, there has been a a slightly downward trend in the use of chemicals due both to the new orientation of the CAP and to the adoption of programmes for integrated measures for plant protection in many Regions.The use per hectare of pesticides is above national average in Liguria, Trentino Alto Adige, Piedmont,Veneto, Friuli and Campania, whereas as regards the per hectare use of fertilsers, figures for the whole of the North of Italy, with the exception of Valle d'Aosta, are above the national average of 158 kg.

Chemical distributed for use in agriculture (Kg per ha of eligible area) (1)

	Fertilisers				Pesticides		
	Nitrogen	Phosphorous pentoxide	Potassium oxide	Total	Fungicides	Insecticides	Weedkillers
1988	77,3	58,8	38,7	16,5	9,2	2,9	2,4
1989	73,0	54,2	34,6	14,9	8,1	2,7	2,2
1990	59,9	47,7	28,1	15,2	8,4	2,7	2,1
1991	64,4	46,7	28,8	13,6	7,1	2,6	2,0
1992	70,0	48,3	30,9	13,9	7,5	2,6	1,8
1993	75,6	51,2	31,3	13,7	7,6	2,7	2.0

(1) eligible area is the sum of areas of arable land (minus set-aside), tree crops, (exluding canes), forage crops (exluding pasture) and vegetables.

The use of fertilisers and chemicals (billion lire)



The use of fertilisers and chemicals in Italy in 1992 (retail sales)

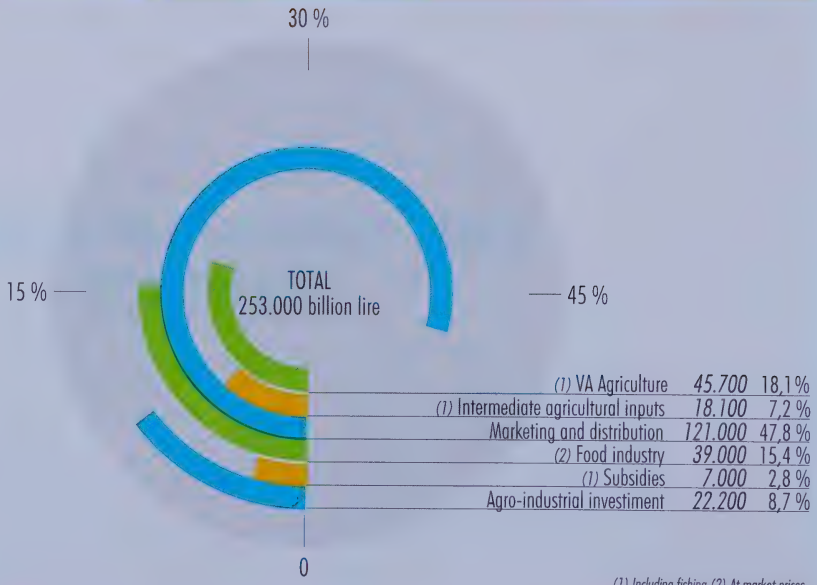
Regions	Nitrogen	Nitrogen phosphate	Potassium oxide.	Chemicals	
		000 kg.		000 ql.	change % 1992/85
Valle d'Aosta	0,4	1	1	37	-21,3
Piemonte	702	413	535	13.149	-24,7
Lombardia	1.162	700	777	11.714	-15,8
Trentino A.A.	95	52	73	5.328	12,3
Veneto	886	622	677	20.417	10,0
Friuli V.G.	288	173	202	3.844	15,3
Liguria	20	17	22	2.626	20,6
Emilia R.	1.140	864	472	27.488	23,4
Toscana	529	314	125	7.473	-1,4
Umbria	247	161	48	3.052	29,5
Marche	366	266	68	5.443	10,1
Lazio	465	328	120	8.600	-12,9
Abruzzi	355	234	92	4.058	-9,5
Molise	107	79	10	802	9,6
Campania	433	210	102	11.391	-22,8
Puglia	832	625	181	17.378	4,9
Basilicata	130	91	23	2.225	48,1
Calabria	251	168	81	3.778	-8,8
Sicilia	601	518	255	16.347	10,6
Sardegna	246	273	49	5.019	93,9
ITALY	8.855	6.109	3.913	170.169	2,0

THE AGRO-INDUSTRIAL SYSTEM

Components

The agro-industrial system constitutes a set of activities where agriculture interacts with all those sectors which are linked to it: the production of inputs (fertilisers, pesticides, feed compounds, energy etc); the food and catering industries.
Estimates set the value of the agro-industrial complex in 1994 at 253,000 billion lire, about 15% of GDP.The main components are: 46,000 for value added in agriculture, 18,100 for intermediate inputs, 22,000 agro-industrial investment, 39,000 value added in the food industry, 121,000 for the trading and distributive sector.
Services supplied by the public sector are not included in the estimates, even though they make an important contribution to the system.

Main component



(1) VA Agriculture	45.700	18,1 %
(1) Intermediate agricultural inputs	18.100	7,2 %
Marketing and distribution	121.000	47,8 %
(2) Food industry	39.000	15,4 %
(1) Subsidies	7.000	2,8 %
Agro-industrial investiment	22.200	8,7 %

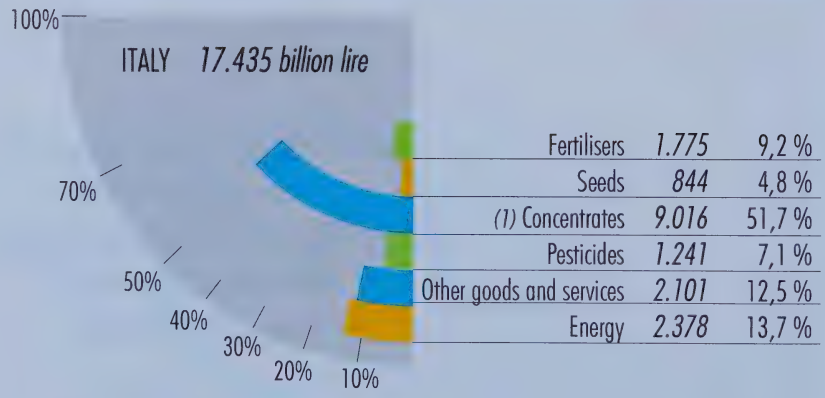
(1) Including fishing (2) At market prices.

Intermediate inputs
Investment
Credit for agriculture
Mechanisation
Employment

Intermediate Inputs

Expenditure for intermediate inputs in 1994 was only slightly higher than that for 1993. This was, in fact, the outcome of a limited increase in average prices (1.4%) and a small drop in quantities used (-1%).
There was a reduction in the use of all the main categories of inputs and in particular, of seeds (-1.3%), fertilisers (-1.7%), pesticides (-1.2%), feed concentrates (-1.1%). Trends in prices were quite varied, with average increases of 0.6% for feed concentrates, 4-5% for seeds and pesticides, 7% for fertilisers. Energy prices, on the other hand, fell. The percentage incidence of expenditure for intermediate inputs on VFO has fallen from 29.1% in 1990 to 28.5% in 1995, mostly as a result of economy in quantities used.
This, in turn, has depended on farmers'attempts to reduce costs of production and on the increased adoption of set-aside and of methods of cultivation compatible with the environment.

Main categories of intermediate inputs



(1) Including other expenses for livestock

Trends in agricultural investment (*)

	Value current prices billion lire	Value 1985 prices billion lire	% of total gross fixed investment (1)	% ratio agricul. investment to agricultural VA (1)
1980	7.465	13.929	7,9	36,3
1981	8.646	13.319	7,8	34,9
1982	9.229	12.289	7,6	33,0
1983	10.537	12.643	7,9	30,9
1984	11.583	12.657	7,6	32,6
1985	12.234	12.234	7,3	31,2
1986	13.103	12.410	7,2	31,2
1987	13.611	12.225	6,8	29,5
1988	16.117	13.666	7,1	34,0
1989	16.397	13.062	6,5	32,1
1990	16.180	12.041	5,8	30,6
1991	16.456	11.403	5,3	26,8
1992	16.238	10.772	5,2	25,0
1993	15.717	10.002	5,6	23,6
1994	16.588	10.213	5,7	24,1

(*) Including forestry and fishing
(1) At 1985 prices.

In 1994 investment in agriculture increased by about 2% in real terms, thus putting a halt to the downward trend which has been evident for about five years. There was an increase in demand for agricultural machinery (1.3%) and other equipment (5.1%) as well as in that for investment in farm improvement. Investment in non-residential rural buildings also increased (5.6%).

The share of agricultural in total investment increased slightly as compared with 1993 as a result, amongst other things, of stagnation in the economy as a whole; it increased in proportion to value added in agriculture, though without arriving at the same levels as in the nineteen eighties.

Credit for Agriculture

At the end of 1994 operations in credit for agriculture amounted to 26,300 billion lire showing a decline of 1.4% as compared with 1993. This was due to a decrease in erogations for working capital (-12%) and for farm improvement (-11%). The amount of subsidised credit decreased by about 300 billion lire, mainly due to changes in the Community policy of support to the primary sector which favour direct subsidies to farms.In addition, greater use was made of institutional incentives not specific to the agricultural sector. Financing for new plantings of permanent crops, for irrigation and for works to improve terrain amounted to 73 billion lire, a reduction of 6.6% as compared with 1993.Trends in credit for the purchase of machines and livestock were reversed, with nominal increases repectively of 6.9% and 29%.

Erogation

Type of credit	1993		1994	
	billion lire	% credit subsidised	billion lire	% credit subsidised
Farm improvement	14.058	46,6	12.379	46,2
Working capital	1.780	53,2	1.596	48,8
TOTAL	15.838	47,4	13,975	46,5

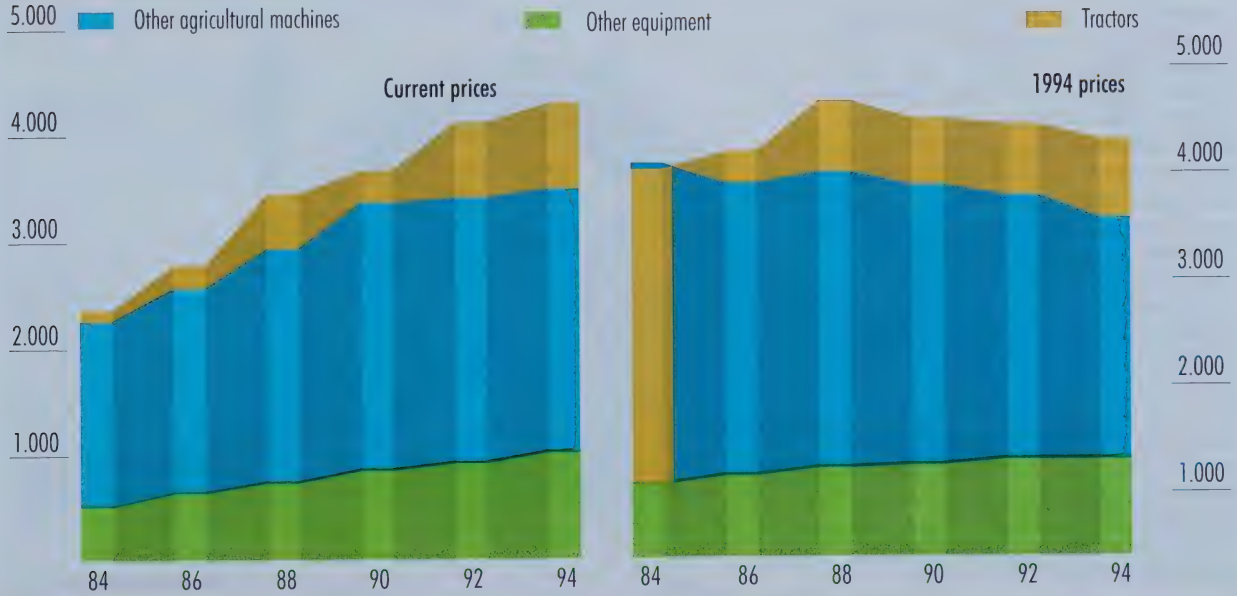
Level of indebtedness in agriculture

	1989	1990	1991	1992	1993	1994
Agrarian credit (billion lire)	27.153	27.653	27.862	27.111	26.661	26,279
% VFO	49,6	49,5	44,9	44,7	45,3	44,4

Source: calculation on data from Bank of Italy.

Mechanisation

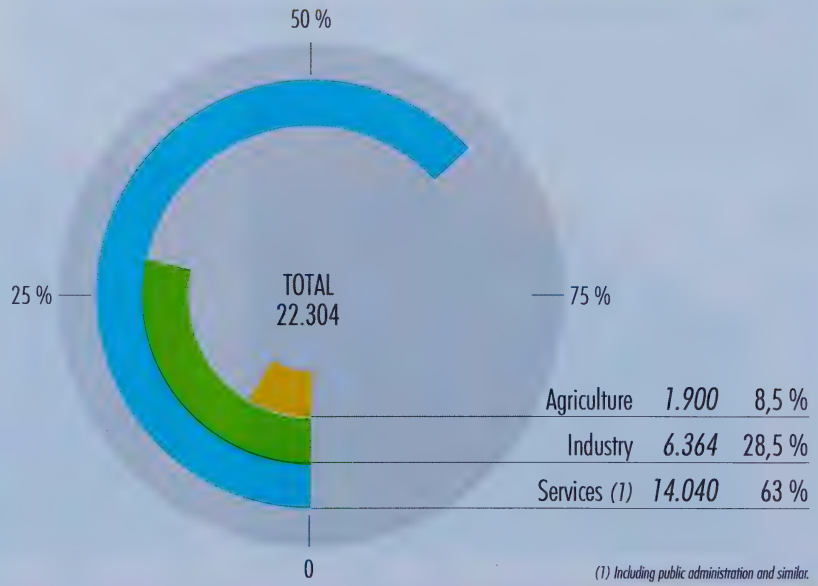
Investment in machines and equipment (billion lire)



Employment

In 1994 the total figure for employment expressed in work units showed a further fall following that already experienced in 1993.
Demand for labour fell in all main sectors: agriculture (-3.8%), industry (-2.0%), marketed services (-1.3%), public administration (-0.4%).
The reduction affected both regular and non-regular labour, even taking into account a slight increase in the employment of non-resident foreigners and of second jobs.
In agriculture there was a fall both in the number of employed workers (-3.9%) and in that of self-employed workers (-3.8%).
This latter cetegory, moreover, showed a drop in numbers of 51,000 work units, due mainly to a reduction in the number of family workers who left the sector for jobs, even insecure jobs, in the industrial and service sectors.

WU per sector (000 units)



Agriculture	1.900	8,5 %
Industry	6.364	28,5 %
Services (1)	14.040	63 %

(1) Including public administration and similar.

WU/population (%)

Employment in agriculture in the EU

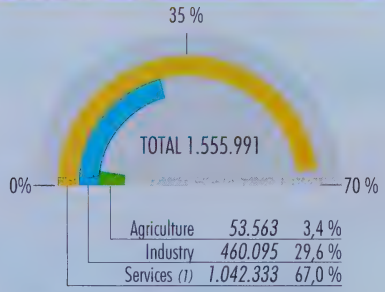
(1) Including ex-GDR.

Value added
Productivity
Production
Prices and costs
VFO and agricultural incomes

Value Added

In 1994 VA at factor cost in the primary sector increased by 1.6% at current prices as compared with 1993. The contribution of agriculture to value added for the country as a whole amounts to 3.4%.
At constant prices the share of agricultural value added in the national total has fallen from 8.1% in 1970 to 6.2% in 1980 and to 4.4% in 1994.Over the same period the share of services increased considerably, exceeding 62% of the total; that of industry has shown signs of decline in recent years.
The share of agriculture in Italy is still greater than that in other industrialised countries, especially in terms of employment. Trends in these variables in recent years have brought the Italian position closer to those of other countries of the centre and north of Europe.

VA per sector (billion lire)



(1) Including, forestry and fishing
(2) Including public administration and auxiliary services

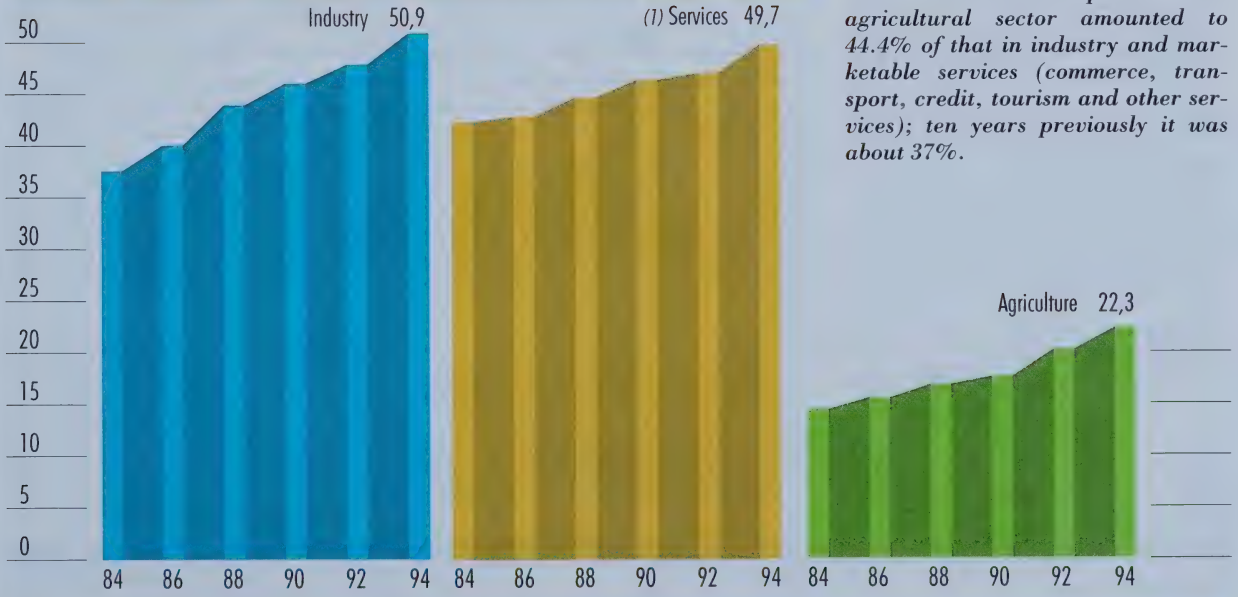
The share of agriculture in the economy as a whole (*)

Countries	Value added %	Employment %
Italy	3,6	7,4
France	2,9	5,0
Spain	3,0	10,1
Greece	14,2	21,3
Germany (1)	1,2	3,0
Netherland	3,6	4,6
United Kingdom	1,4	2,1
UE	2,5	5,5
USA (2)	2,2	2,9
Japan (2)	2,4	6,4

(*) EUROSTAT data 1992 for VA, 1993 for employment, exept Holland, 1992.
(1) Excluding GDR (2) Source: EUROSTAT 1991 for VA.

Productivity

VA/WU by sector at 1985 prices (billion lire)



Value added per work unit at factor cost and at constant prices in the agricultural sector amounted to 44.4% of that in industry and marketable services (commerce, transport, credit, tourism and other services); ten years previously it was about 37%.

(1) Excluding public administration and similar

Production

There was an increase in the current value of saleable output from agriculture of 2% as compared with the previous year, although in volume terms it was more or less stable (-0.2%) despite the fact that 1993 had been a particularly negative year for production.

Climatic conditions were not favourable: in November the North-west experienced a disastrous flood which, particularly in Piedmont, damaged structures and infrastructure as well as crops.The negative effects on harvests in the year under examination have been relatively limited; the damage will, however, have serious consequences in the next season.

The field crops sector showed an increase of 2.5% whilst there was a decline in tree crops (-5.5%). Livestock production increased (0.7%). Productive results in individual sectors varied considerably, reflecting both climatic conditions and farmers' decisions in implementing the new Common Agricultural Policy.

Cereals declined (-3%) as the result of a strong reduction in soft wheat, maize and especially barley (-10%). Oilseeds increased by more than 40% and sugar beet by 13%, recovering from the strong decline of 1993. Vegetables also increased (2.8%). In the tree crops sector the

VFO by sub-sector

Sub-sector	North		Centre		South		Italy	
	billion lire	%	billion lire	%	billion lire	%	billion lire	%
Field-crops *(1)*	9.065	28,9	3.726	43,0	8.893	40,5	21.684	35,0
Tree crops	5.317	17,0	1.937	22,3	8.099	36,8	15.352	24,8
Livestock	16.463	52,6	2.792	32,2	4.818	21,9	24.074	38,8
Forestry	482	1,5	213	2,5	176	0,8	870	1,4
TOTAL	31.327	100,0	8.667	100,0	21.986	100,0	61,980	100,0

(1) Including forage.

Agricultural production in countries of the EU in 1993 (*)

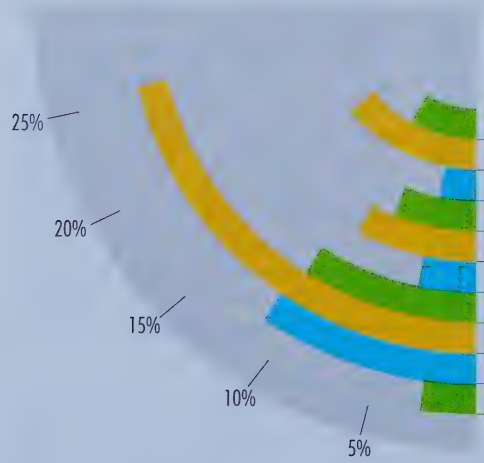
Crop	Harvest		Marketable output	
	000 t.	% change	000 t.	% change
soft wheat	3.895	-4,9	1.171	-10,8
hard wheat	4.142	1,7	1.236	-19,4
maize	7.485	-6,8	1.815	-11,3
rice	1.361	4,2	895	9,6
sugar-beet	12.521	13,2	1.096	10,8
tobacco	133	-2,1	602	1,9
soya	700	16,1	259	10,5
sunflowers	550	93,3	215	104,8
potatoes (new and ordinary)	2.012	-4,1	947	33,0
tomatoes	5.536	7,5	1.330	15,0
grapes (dessert and ordinary)	9.038	-7,3	-	-
wine (000 hl)	57.717	-6,8	4.804	0,2
olives (for oil and for table)	2.596	-16,8	-	-
oil (000 ql pressed.)	4.593	-18,8	2.254	-11,3
apples	2.228	3,9	1.410	28,7
pears	910	-0,6	631	-2,7
peaches and nectarines	1.785	8,6	1.187	-
oranges	1.836	-13,0	944	-2,5
lemons	640	-13,6	560	-4,5
mandarines and clementines	461	-10,0	300	-1,9
kiwi	340	-7,3	401	1,0

strongest decline was in the production of olives (-19%) due to a year of low yield in the two-year production cycle and to unfavourable weather conditions.

The production of wine fell once more (-6.8%) whilst that of fruit increased for apples (4%), peaches and nectarines (9%), apricots (11%), hazel nuts (41%) cherries (6%). On the contrary, there were smaller harvests of pears and walnuts(-21%) and of kiwi fruit (-7%). In the citrus sector there were decreases for oranges (-13%), mandarines (-14%) and lemons (-13.6%).

(*) provisional data.

VFO in agriculture by main sector



	billion lire	%
TOTAL	*61.110*	*100,0*
(1) Cereal, forage and dried pulses	*5.863*	9,6
(2) Horticultural	*10.067*	16,5
(3) Industrial crops	*2.199*	3,6
Flowers and ornamental plants	*4.368*	7,1
Grapes	*5.535*	9,1
Olives	*2.394*	3,9
Fruit including citrus	*6.611*	10,8
Meat	*15.582*	25,5
Milk	*6.882*	11,3
Eggs and other	*1.609*	2,6

(1) Forage crops were 150 billion lire, dried pulses, 109 billion lire (2) including potatoes.
(3) sugar beet, tobacco, oilseeds, textile fibres and other industrial products.

In the livestock sector, production of meat increased, especially of beef (1.7%) and pork (2.1%). Production of cows' milk fell (-1.5%) alongside a contraction in the number and size of dairy farms.

Main livestock products and changes since 1993

Types of livestock and product	Number		Output *(5)*		Marketable output	
	000 head	% change	000 t.	% change	billion lire	% change
Cattle *(1)*	7.304	-3,5	1.515	1,7	6.164	4,9
Pigs	7.998	-4,2	1.627	2,1	4.050	0,4
Sheep and goats	12.070	2,0	98	0,9	441	-3,3
Poultry *(2)*	178.600	3,0	1.368	0,5	3.496	-0,9
Rabbits			371	2,2	1.347	1,5
Eggs *(3)*			12.000	0,6	1.556	5,3
Cows' milk *(4)*			9.470	-1,5	6.146	2,4
Sheep and goat milk *(4)*			640	0,5	736	3,8

(1) including buffaloes.
(2) Of which 100,4 million hens, 55,9 laying hens, 11,8 turkeys, 4,8 guinea fowl, 1,7 ducks and geese. Source: UNA.
(3) Production in millions.
(4) Production in 000 hl; buffalo milk included with cows milk.
(5) Liveweight for meat.

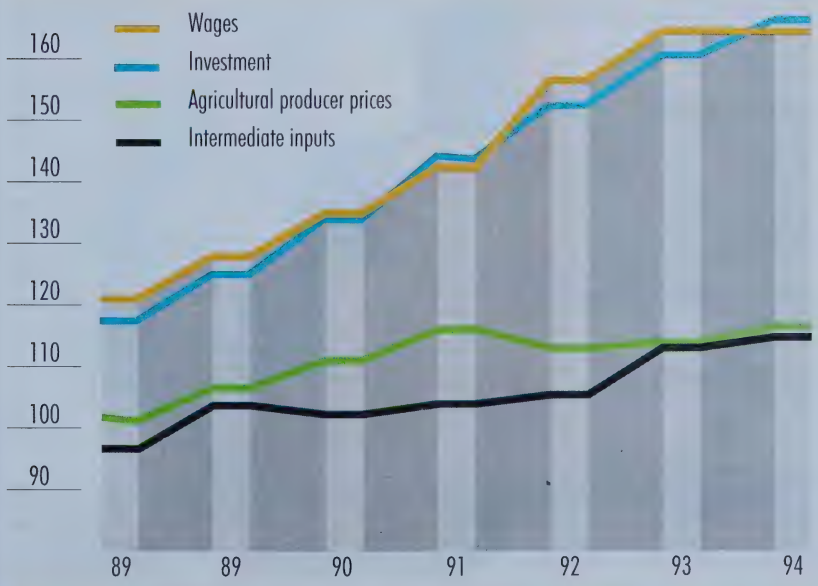
Agricultural production in countries of the EU in 1992

Country	Final output (1) (*) million ECU	%	Crop production (*) million ECU	Livestock production (*) million ECU
Italy	37.793	19,1	62,6	37,4
Belgium	6.559	3,3	35,8	64,2
Denmark	6.459	3,3	28,1	71,9
Germany	27.550	13,9	38,5	61,5
Greece	8.520	4,3	70,4	29,6
Spain	23.813	12,0	58,0	42,0
France	44.905	22,7	52,0	48,0
Ireland	4.420	2,2	13,6	86,4
Luxembourg	189	0,1	22,8	77,2
Netherlands	16.012	8,1	41,6	58,4
Portugal	3.554	1,8	45,0	55,0
United Kingdom	18.216	9,2	39,3	60,7
EU 12	197.990	100,0	49,0	51,0

(*) Exchange rate 1 ECU=approx. 1,595 lire in 1992 .
Source: EU Commission: The situation of agriculture in the Community, 1994 and EUROSTAT statistiques en bref 1995 n. 9.

Prices and Costs

Index numbers (base 1985=100)



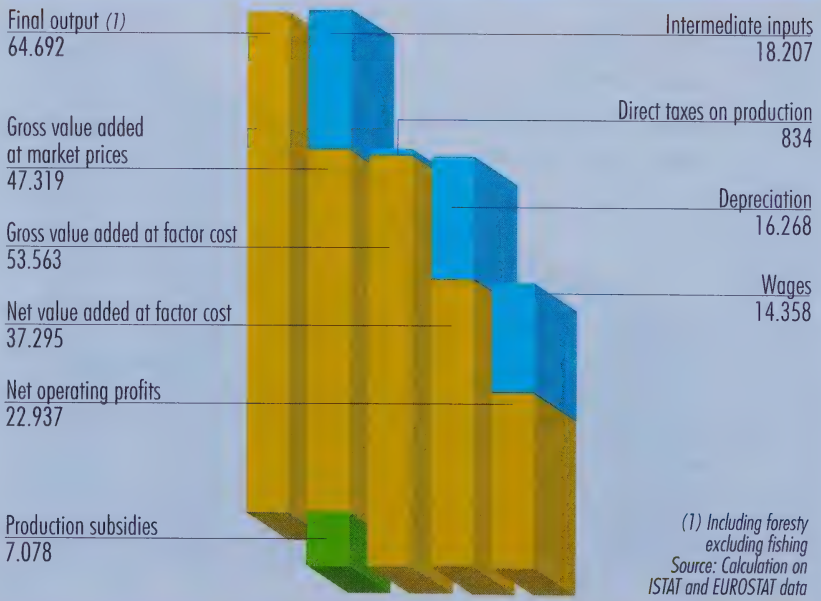
Prices of intermediate inputs rose very little in 1994 (1.4%). The increase in the prices of raw materials for the feed concentrates industry was slight; a reduction in taxation influenced the cost of fuel for agricultural purposes. Price increases for investment goods also slowed down.The average level of agricultural product prices increased by only 2.2%, contributing to a reduction in the general rate of inflation.

In contrast with a strong increase in prices for tree crops, the average level of prices for field crops remained stationary. There were downward trends in the sectors of cereals (-7%) and industrial crops (-4%); instead, increases were registered in prices for horticultural (4%) and floricultural (5%) products. Price increases in the livestock sector were modest (1.4%). Terms of trade between agricultural product prices and costs of production improved.

VFO and Agricultural Incomes

In 1994 the value of final marketable output, including production subsidies, was constituted as follows: 25% intermediate inputs (seeds, fertilisers, feed concentrates, energy etc.) and 20% wages. Subsidies from the European Union and from the Italian state amounted to 10%, a reduction as compared with the previous year. About 31.9% went to self-employed labour (farm entrepreneurs and family workers) together with capital and enterprise and 22% went towards amortisation.

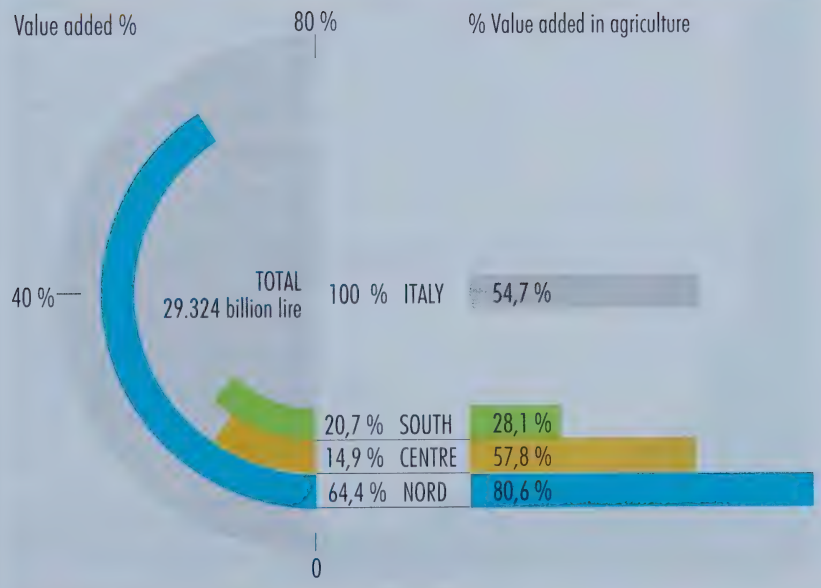
The structure of agriciultural income



(1) Including foresty excluding fishing
Source: Calculation on ISTAT and EUROSTAT data

The Food Industry

VA at factor cost



The food industry accounted for about 9% of total value added at factor cost for the manufacturing sector as a whole.
Its relative weight has declined since 1993: amongst the sectors hardest hit by the crisis are those of fruit and vegetable processing (-16%), oils and fats (-4%), dietetic products (-13%) grain processing (-3%), animal feedstuffs (-2.9%).
Value added in the food industry fell in real terms by 1% in contrast with the recovery demonstrated by the industrial sector as a whole (+5%). Such unsatisfactory results for the food industry have not been witnessed for many years. Nevertheless, taking a medium-term view, the production index for the sector reached 104.6, on the base 1990=100, a higher level than that for the average of the manufacturing sector (100.7).

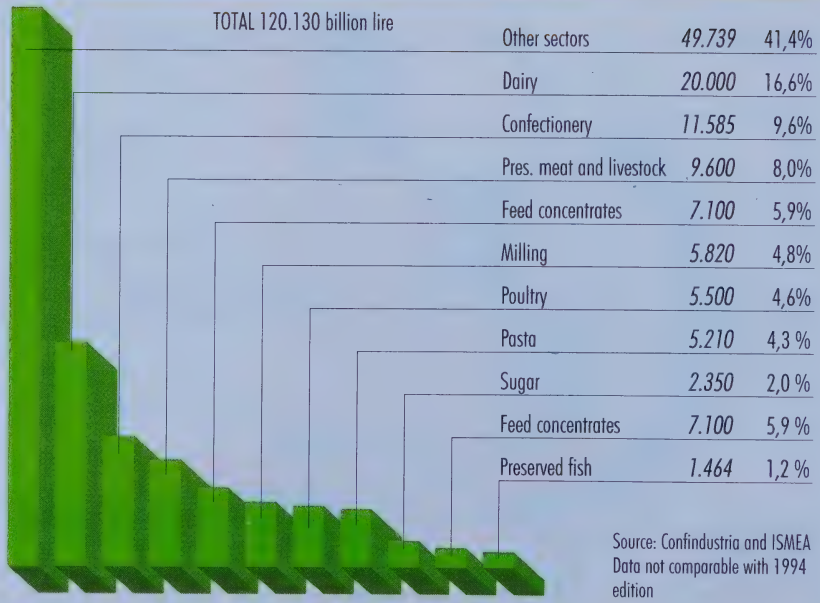
Innovative manufacturing processes and technologies have been introduced into the sector which have stimulated expansion in new markets; consumers' buying habits have changed considerably.

The food industry in Italia is in continous evolution and attracts considerable amounts of investment both from national and from foreign sources: concentration is increasing although productive capacity is still strongly dominated by the presence of small and medium enterprises.

Strong differences remain in geographical, structural and technological development, particularly between the South and the Centre-north. Manufacturing activities are mainly concentrated in the North where, in the last ten years the rate of increase in value added has proceeded at twice that of the South.

In the European Union the agro-

Turnover in the food industry by sub-sector, 1993


TOTAL 120.130 billion lire
Other sectors 49.739 41,4%
Dairy 20.000 16,6%
Confectionery 11.585 9,6%
Pres. meat and livestock 9.600 8,0%
Feed concentrates 7.100 5,9%
Milling 5.820 4,8%
Poultry 5.500 4,6%
Pasta 5.210 4,3 %
Sugar 2.350 2,0 %
Feed concentrates 7.100 5,9 %
Preserved fish 1.464 1,2 %

Source: Confindustria and ISMEA
Data not comparable with 1994 edition

The food industry in the UE (1993) (*)

Country	% turnover	% employment
Italy	12,7	9,2
France	19,5	14,7
Germany F.R.	23,3	21,5
Benelux	10,7	8,6
Denmark	3,1	2,7
United Kingdom	16,7	20,9
Spain	8,8	14,9
Other *(1)*	5,2	7,5
EU	*(2)* 497.500	*(3)* 2.348,8

(*) Including drinks and tobacco
(1) Ireland, Greece, Portugal
(2) Million ECU, exchange rate (1992) 1ECU= 1.840 lire approx
(3) 000 unit
Source: EUROSTAT Panorama of Community Industry, supplement n.6/1994

Production in Italy: changes

Sectors	1994/93
Milling *(1)*	↓
Pasta	↓
Biscuits and bread	↑
Processing fruit and vegetables	↓
Oils and fats	↓
Butchery and meat processing	↑
Dairy production	↑
Sugar refining	↑
Confectionery	↑
Frozen food	↑
Infant and dietary	↓↓
Wine	↑↑
Mineral water and soft drinks	↑↑
Beer and malt	↑
Animal feedstuffs	↓

(1) Including starch products

food sector represents one of the main sectors as regards employment and value added:the increase in turnover is relatively greater in Northern Europe, especially in France and in Germany.

Retail distribution

Important changes have been under way for several years in all sectors of retail distribution and have favoured development of the modern retailing sector.In the food sector there has been a decrease in wholesale enterprises, especially in the North and Centre of the country. In recent years the phenomenon has spread also to the South. The number of retail outlets has fallen throughout the country and especially in the North. As a national average, the ratio between population and the number of retail outlets with fixed location has increased between 1984 and 1994 from 168 to 214 inhabitants per outlet.For vendors without fixed premises the reduction in numbers is even more striking, especially in the South. Associations between retail traders are relatively scarce, particularly in the South where only 2% of traders adhere to such groups as compared with 18-20% in the North. Taking a longer view, the revival of demand should encourage the process of modernisation and improve the organisation of distributive structures.

Food marketing channels in Italy (1)

	NORTH		CENTRE		SOUTH		ITALIA	
	%	% change on 1984	%	% change on 1984	%	% change on 1984	n.	% change on 1984
WHOLESALE	45,4	-23,7	17,8	-6,7	36,8	14,4	32.296	-9,7
RETAIL								
Ordinary	40,4	-24,6	20,5	-15,2	39,1	-18,4	268.049	-20,4
Mobile	46,8	-32,3	20,9	-41,6	32,3	-48,5	27.510	-40,3

(1) as of 1st January, 1994 Source:calculated on data from the Ministry of Trade and Industry.

The modern food retailing sector

There have been positive developments in the modern retailing sector, especially as regards food retailing: on 1st January 1994 there were 3,906 supermarkets as compared with 3,696 the year before (+5.7%) and 203 hypermarkets as compared with 182 (+11.5%).
The figure for supermarkets includes 184 large retail stores with a food department.
Alongside the increase in the number of retail outlets there was an increase in the retail area (+8.5%) and in the number of employees (+5.6%). Modern retailing accounted for a growing proportion of expenditure on retail food sales.
According to estimates made by the Ministry for Industry it passed from 31.5% in 1992 to 35.2% in 1993.
Despite the rapid spread in moodern retail outlets, the difference between the South and the Centre North of the country persists: in the former, both the number and the size are more limited.

Food retailing by district (1)

District	Outlets	Sales area (m^2)	Employees	No. of units per 100.000 inhabitants	Sales area m^2/1.000 inhabitants
North	2.301	2.235.431	66.436	9,1	87,9
Centre	826	754.556	23.485	7,5	68,7
South	982	783.693	15.661	4,7	37,6
Total	4.109	3.773.680	105.582	7,2	65,9

(1) Autonomous supermarkets and food departments of large stores.
Source:calculated on data from Ministry of Trade, Industry and Crafts.

Food Consumption

In 1994 expenditure on food and drink amounted to about 185,000 billion lire, an increase of 3.3% as compared with 1993. Prices increased by 3,2% and quantities by 0.1%, very much in line with growth of population.

As compared with the previous year, consumption of cereals and bread increased (0.2%) as did those of dairy products (0.4%) and fruit and vegetables (1.8%); in contrast, there were decreases in the consumption of meat (0.1%), oils and fats (0.4%), and alcoholic drinks (1.5%).

The share of food consumption fell once more: in 1994 it amounted to 18% of household consumption expenditure; ten years earlier it had been about 24%.

Consumer behaviour also underwent considerable changes:food consumption at home declined whereas that outside the home increased. If expenditure outside the home is taken into consideration, food expenditure increases considerably, to about 220,000 billion lire, including the expenditure of foreign tourists in Italy.

The most important category of expenditure is that on meat (51,000 billion lire), followed by horticultural products, including potatoes (more than 39,000 billion lire); bread and cereal-based products (almost 24,000 billion); fish (more

The structure of food consumpion

Product	% food expediture	annual overge rate of change1985/94 % quantity	price
Bread and cereals	12,8	0,76	5,92
Meat	27,4	-0,01	4,63
Fish	6,2	2,03	6,48
Dairy production and eggs	14,3	0,61	5,15
Fats and oils	3,7	0,02	4,43
Horticultural produce (1)	21,2	0,57	4,64
Other (2)	6,7	1,40	4,53
Alcoholic beverages	5,4	-1,49	6,46
Non-alcoholic beverages	2,3	6,55	5,28
TOTAL	100.0	0,53	5,03

(1) Including potatoes.
(2) Coffee, tea, cocoa, sugar, sweet etc.

Food consumption in the EU (kg. per head)

Products	Italy	France	Spain	Greece	Germany	United Kingdom	EU
Cereals *(1)*	121	72	71	103	73	75	81
Rice	5	4	6	6	2	4	4
Potatoes	41	74	105	81	75	94	79
Vegetables *(2)*	178	124	192	208	81	65	116
Fruit including citrus *(2)*	142	82	112	147	97	59	93
Milk *(3)*	64	97	98	62	93	131	98
Cheese	19	23	7	21	17	7	14
Butter	2	8	0.4	1	7	3	5
Total meat	86	100	97	79	95	71	87
Beef	21	24	13	22	19	17	20
Pork	33	37	50	23	56	23	41
Fats and oils *(4)*	31	22	33	33	23	30	27
Sugar *(5)*	28	35	27	20	35	39	34
Wine *(6)*	63	65	42	28	26	12	37

N.B. data refer to the '92/93 season; dairy products and meat to 1992.
(1) in flour equivalent; Spain 1991/92, Germany and UE.
(2) including processed, dried fruit and nuts; France 1988/89, Spain 1991/92, Germany 1990/91, UE 1987/88.
(3) including other fresh produce; UE 1989/90; Spain 1991.
(4) Oils and fats; Greece and France 1988/89, G. Britain, Italy 1989/90.
(5) White sugar equivalent.
(6) Litres per head; Germany 1990/91.

than 11,000 billion); wine and alcoholic drinks (about 10,000 billion).

In the last ten years the structure of food consumption shows a decrease in meat,wine and alcoholic drinks and an increase in fish, dairy products and eggs.

Levels of per caput consumption point strongly to the Mediterranean content of Italian food demand, which as compared with the average for the European Union, is almost 40% higher for cereal-based products, 50% for vegetables and 70% for wine. In contrast, consumption of milk is lower by 30% and that of pork by about 20%.

Foreign Trade

Total domestic agro-food production is lower than consumption and therefore the trade balance is constantly in deficit; the rate of self-sufficiency has, nevertheless, improved since 1980, principally due to an increase in the propensity to export. Data for the trade balance of 1994, however, show that the deficit rose, in monetary terms, to more than 17,200 billion as compared with 15,300 in 1993 (+12.4%). Thus the rate of self-sufficiency fell by about one point as compared with the previous year.

The agro-food balance and the agro-industrial system (*)

Products	1980	1990	1994
MACRO-ECONOMIC AGGREGATES			
Total agro-industrial production *(1)*	101.453	107.870	103.724
Imports	32.953	36.767	38.731
Exports	11.921	16.344	21.495
Balance	-21.032	-20.423	-17.236
Volume of trade *(2)*	44.874	53.111	60.226
Apparent consumption *(3)*	122.845	128.293	120.960
INDICATORS			
Degree of self-sufficiency *(4)*	86,1	84,1	85,7
Propensity to import *(5)*	20,9	28,7	32,0
Propensity to export *(6)*	8,1	15,2	20,7
Degree of trade cover *(7)*	33,6	44,4	55,5

(*) billion lire at 1993 prices
(1) VFO for agriculture, forestry and fishing and value added for the food industry
(2) Sum of exports and imports
(3) Agro-industrial production plus imports minus exports
(4) Ratio between production and consumption
(5) Ratio between imports and consumption
(6) Ratio between exports and production
(7) Ratio between exports and imports
Source: calculated on ISTAT date

Foreign trade in agro-food products (*) with the European Union and third countries

Product	Imports	Exports	Balance	Product	Imports	Exports	Balance
CROPS	9.053	5.638	-3.415	FOOD INDUSTRY	15.100	11.201	-3.899
Cereals	1.984	246	-1.738	Flour and pasta	54	1.605	1.551
Wheat	1.547	172	-1.375	Rice	33	635	602
Maize	222	12	-210	Sugar	307	131	-176
Vegetables, fresh	899	1.147	248	Confectionery	625	826	201
Fruit	1.808	3.239	1.431	Meat	5.701	1.391	-4.310
Citrus	159	156	-3	Processed fish	1.013	133	-880
Coffee, tropical beverages	1.345	30	-1.315	Processed tomatoes	76	1.041	965
Oilseeds	703	10	-693	Other proces. vegetables	670	1.249	579
Uncured tobacco	180	248	68	Cheese and butter	2.261	1.153	-1.108
Cotton	901	27	-874	Olive oil	1.386	682	-704
LIVESTOCK	4.909	108	-4.801	Other oil and fats	593	234	-359
Live animals	2.434	56	-2.378	WINE and VERMOUTH	217	2.897	2.680
Milk *(1)*	1.627	24	-1.603	OTHER BEVERAGES	899	717	-182
FOREST PRODUCTS	1.494	121	-1.373	OTHER PROCESSED			
FISH and GAME	2.657	331	-2.326	AGRICULTURAL PRODUCTS	4.402	482	-3.920
Fresh and frozen fish	2.500	323	-2.177				
				TOTAL	38.731	21.495	-17.236

(1) Fresh and preserved.

Geographical distribution of Italian agro-food trade (%)

	IMPORTS			EXPORTS		
	ag. produce	food industry	total	ag. produce	food industry	Total
EUROPEAN UNION	49,0	77,6	67,3	73,6	61,0	64,5
France	22,7	17,6	19,4	11,3	14,8	13,8
Germany	4,9	19,9	14,5	40,6	22,4	27,4
Netherlands	6,8	16,4	12,9	4,2	4,0	4,1
United Kingdom	2,5	4,2	3,6	5,8	8,8	8,0
Belgium and lux.	2,2	4,7	3,8	3,3	3,5	3,4
Spain	4,6	5,2	5,0	4,3	3,5	3,7
Denmark	1,7	5,6	4,2	1,4	1,0	1,1
Greece	3,3	2,7	2,9	1,6	1,9	1,8
CENTRAL-EAST EUROPE	9,3	2,8	5,2	5,6	7,2	6,8
Poland	1,8	0,2	0,8	0,5	0,5	0,5
Hungary	1,7	0,5	1,0	0,3	0,4	0,4
CIS	3,8	1,2	2,2	0,5	3,0	2,3
OTHER DEVELOPED COUNTRIES (1)	13,5	6,7	9,1	16,2	20,5	19,3
Austria	1,1	1,2	1,1	4,8	1,5	2,4
Switzerland	1,3	1,7	1,6	6,7	4,0	4,7
Norway	0,0	0,3	0,2	0,8	0,3	0,4
USA	5,6	1,5	3,0	1,0	9,3	7,0
Canada	1,2	0,2	0,5	0,3	1,6	1,2
MEDITERRANEAN COUNTRIES (1)	4,2	2,5	3,1	2,7	4,6	4,1
REST OF THE WORLD	24,1	10,4	15,3	1,9	6,6	5,3
Argentina	1,8	1,7	1,7	0,2	0,5	0,5
Brasil	3,6	2,4	2,8	0,2	0,4	0,4
Rest of America	4,4	1,2	2,3	0,3	0,5	0,4
China	3,0	0,5	1,4	0,1		
TOTAL	100,0	100,0	100,0	100,0	100,0	100,0

(1) Mediterranean countries of non - EU EUROPE, Africa and Asia.

FARM STRUCTURE

Between November 1993 and February 1994 ISTAT carried out the first of the three two-yearly sample surveys on farm structures required by the European Union following the Fourth Agricultural Census of 1990.

The first provisional results are reported here and refer to the so-called "EEC universe" which is smaller than the national one in that farms with less than one hectare of UAA and whose sales are less than 1,500,000 lire are not considered.

At the same time, two other Community surveys were carried out, using the same questionnaire, which aimed to gather information on the area of land sown to cereals and the corresponding level of production.

Farms and Farm Area

In 1993 the EEC universe contained 2,488,393 farms with a total area of 20.6 million hectares and a UAA of 14.7 million hectares.
As compared with the Census of 1990, referring to the same universe, there was a fall of 6.6% in the number of farms and of 4.1% and 2.1% respectively in total farm area and in utilised agricultural area.
The strongest decline in terms of the number of farms took place in the South (-7.1%) whilst in the North there was a more marked drop in total and utilised agricultural area, of -5.5% and -3.0% respectively.
The survey confirms the high incidence of farms of very small dimensions. In 1993, more than three quarters of the farms were of less than 5 hectares UAA and constituted less than 20% of total UAA with an average of 1.5 hectares per farm.In particular, slightly more than one

Farms , total farm area and UAA

UAA '93

14.736	ITALY	- 2,1
5.122	North	- 3,0
2.701	Centre	0,8
6.911	South	- 2,5

'90

5.280	North
2.680	Centre
7.085	South

third of farms were no larger than 1 hectare of UAA with an average size of slightly more than half a hectare. In contrast, only 1.6% were of 50 or more hectares in size, with a total UAA of about 5.0 million hectares (43.2%) and an average of 123.9 hectares.

As compared with 1990 there was, however, a decline in the proportion of very small farms to the advantage of the larger ones.

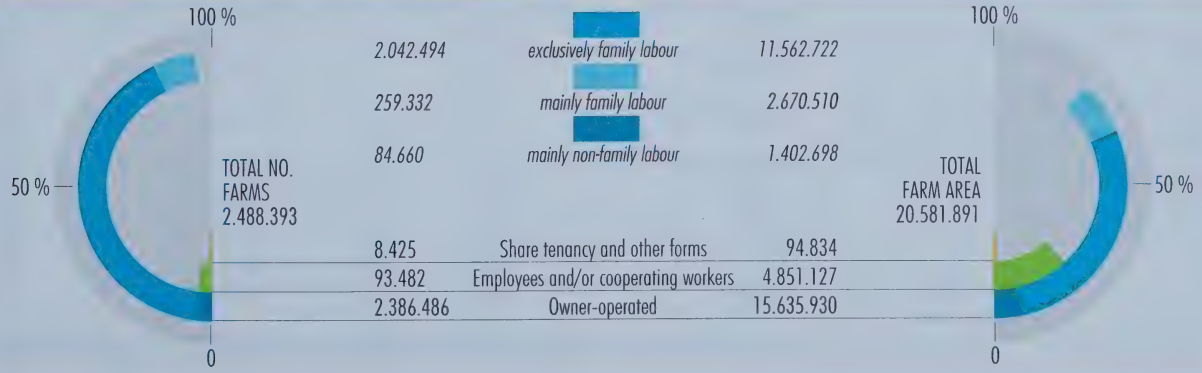
The number of farms and total area by class of UAA

	1993 survey				1990 census			
	FARMS		UAA		FARMS		UAA	
	n.	%	hectares	%	n.	%	hectares	%
Without agric. land	4.473	0,2	-	-	6.886	0,3	-	-
Less then 1 ha	831.039	33,4	433.353	2,9	922.027	34,6	461.492	3,1
1,00 - 1,99	533.972	21,5	728.200	4,9	563.191	21,1	784.630	5,2
2,00 - 4,99	558.367	22,4	1.724.185	11,7	606.953	22,8	1.893.363	12,7
5,00 - 9,99	269.005	10,8	1.855.622	12,6	284.265	10,7	1.967.533	13,2
10,00 - 19,99	157.448	6,3	2.155.888	14,6	155.206	5,8	2.129.753	14,2
20,00 - 49,99	93.462	3,8	2.806.656	19,0	87.661	3,3	2.637.389	17,6
Over 50,00	40.627	1,6	5.032.144	34,1	38.365	1,4	5.072.433	33,9
Total	2.488.393	100,0	14.736.048	100,0	2.664.554	100.0	14.946,593	100,0

Types of Enterprise

More than 95% of the farms in the survey were managed directly by the farmer who, for the most part, (82.1%) worked on the farm alone or with the help only of his immediate family or his relations.
These farms, however, own only 56.2% of total farm area whereas those farms where family labour is predominant (10.4% of the universe) use 13% of the total area; finally, those farms where non-family labour predominates (3.4%) manage 6.8% of the area.
Consequently, the average size of owner-operated farm, 6.6 hectares, corresponds with marked variations, passing from 5.7 in the first group to 10.3 in the second and 16.6 in the latter.
The average size of farms with hired labour or under share-tenancy is, however, considerably larger (equal to 51.8 hectares)

The number of farms and total farm area by type of enterprise


100 %
50 %
0
TOTAL NO. FARMS 2.488.393
TOTAL FARM AREA 20.581.891
2.042.494 exclusively family labour 11.562.722
259.332 mainly family labour 2.670.510
84.660 mainly non-family labour 1.402.698
8.425 Share tenancy and other forms 94.834
93.482 Employees and/or cooperating workers 4.851.127
2.386.486 Owner-operated 15.635.930

The Utilisation of Land

In 1993 two thirds of farms in Italy occupied only 12.7% of total land area under permanent tree crops (vineyards, olive groves, orchards etc.) whilst in the sector of annual crops (including productive household plots) two thirds of farms occupied 39.5% of the area.

The number of farms and area cultivated by main crop (1)

Crops	FARMS		AREA CULTIVATED		
	no.	%	ha	% total area	avj. per farms
ARABLE (2)	1.664.471	67,0	8.124.978	39,5	4,9
Cereals	924.953	37,2	4.063.260	19,7	4,4
- wheat	-	-	2.205.339	10,7	-
- maize	395.241	15,9	936.489	4,6	2,4
Potatoes	138.586	5,6	57.749	0,3	0,4
Sugar beet	62.989	2,5	269.515	1,3	4,3
Vegetables	338.064	13,6	300.136	1,5	0,9
Rotation fodder	464.951	18,7	1.989.575	9,7	4,3
PERMANENT PASTURE	577.650	23,3	3.917.765	19,0	6,8
PERMANENT CROPS	1.658.772	66,8	2.603.219	12,6	1,6
FruitCitrus	357.857	14,4	479.185	2,3	1,3
Vineyards	126.771	5,1	175.877	0,9	1,4
Olives	956.028	38,5	900.574	4,4	0,9
Olives	941.921	37,9	1.026.711	5,0	1,4
Chestnuts	66.568	2,7	90.086	0,4	1,1
TOTAL	2.483.920	100,0	14.736.048	71,6	5,9

Crops	FARMS no.	FARMS % total farms	AREA CULTIVATED ha	AREA CULTIVATED % total area	AREA CULTIVATED avj. per farms
POPLAR	24.162	1,0	73.794	0,4	3,1
WOODS	587.370	23,6	3.948.115	19,2	6,7
AG. AREA NOT USED	433.888	17,5	779.942	3,8	1,8
OTHER AREAS	1.719.501	69,2	1.043.992	5,1	0,6
TOTAL AREA	2.484.357	100,0	20.581.891	100,0	8,3

In fact the UAA, which accounts for 71.6% of total farm area, was distributed as follows: 55.1% arable crops, mainly cereals (27.6%) and rotation forage (13.5%); 26.6% in permanent meadows and pasture.
The remaining 18.3% is under permanent tree crops within which vineyards and olive groves, each occupying slightly less than one million hectares, take up the greater area (more than 1.9 million hectares of which about 900 thousand under vineyards).
The remaining 28.4% of total area is under forest cultivation (4.0 million hectares)

(1) Excluding farms without land.
(2) Including vegetable gardens.

Livestock

The number of farms keeping livestock continues to fall and at present amounts to 847,822 (34.1% of all farms), showing a further reduction of 12.4% since 1990 which affected all types of animal husbandry considered in the survey.
The number of sheep and goats kept increased, however, and totalled 10.1 million (+19.2%) and 1.3 million (+5.9%) head respectively.
The number of cattle decreased to 7.6 million (-2.5%).
The number of pigs remained more or less stationary with a small increase of about four thousand head.
The average per farm rose from 24 to 29 for pigs, from 55 to 69 for sheep and from 14 to 17 for goats.
For cattle farms, reduced both in terms of number and in terms of animals, the average number of head also increased, from 24 to 28.

No. of livestock farms and no. of head

Species	Survey 1993			Census 1990		
	farms	total head	avj. per farm	farms	total head	avj. per farm
CATTLE	267.326	7.591.327	28	319.566	7.759.059	24
PIGS	285.699	8.396.340	29	345.938	8.392.364	24
SHEEP	150.348	10.388.958	69	158.808	8.721.620	55
GOATS	78.576	1.321.441	17	87.333	1.246.518	14
POULTRY	606.354	149.828.322	247	761.447	172.433.839	226
- for meat	368.553	89.739.565	243	452.886	97.454.407	215
- for eggs	564.903	32.838.907	58	710.869	43.797.212	62
TOTAL	847.822			967.451		

Cattle and pig farms by number of head

No. of head	Survey 1993				Census 1990			
	no. farms	%	head	%	no. farms	%	head	%
CATTLE								
1-2	45.816	17,1	72.542	1,0	56.669	17,7	91.835	1,2
3-9	91.021	34,0	492.641	6,5	116.103	36,4	623.043	8,1
10-19	48.812	18,3	659.138	8,7	59.825	18,7	804.911	10,4
20-49	46.147	17,3	1.391.558	18,3	52.075	16,3	1.568.915	20,2
Over 50	35.530	13,3	4.975.448	65,5	34.894	10,9	4.670.355	60,1
TOTAL	267.326	100,0	7.591.327	100,0	319.566	100,0	7.759.059	100,0
PIGS								
1-2	209.311	73,2	296.997	3,6	254.068	73,5	362.271	4,4
3-9	60.918	21,3	223.733	2,7	66.207	19,1	280.117	3,3
10-19	7.042	2,5	119.713	1,4	11.192	3,2	142.625	1,7
20-49	2.216	0,8	204.453	2,4	6.133	1,8	173.693	2,1
Over 50	6.212	2,2	7.551.444	89,9	8.338	2,4	7.433.658	88,5
TOTAL	285.699	100,0	8.396.340	100,0	345.938	100,0	8.392.364	100,0

Irrigation

About 27% of farms in Italy use irrigation, over a total of 2.6 million hectares (18% of the UAA).
As compared with 1990, there has been a significant drop in the number of farms involved (-23%), whilst the area irrigated fell by barely 48 thousand hectares.
Slightly less than two thirds of the irrigated area is in the Northern Regions, involving 34.9% of farms with UAA and with an average area per farm of 6.5 hectares. In the Centre only about 17.9% of farms are affected, whereas in the South the practise is carried out on 25% of farms with a total area of 758 thousand hectares, equivalent on average to 2.2 hectares per farm.

Number of farms with irrigation

DISTRICTS	FARMS		AREA IRRIGATED		
	no.	% all farms w.UAA	ha.	% total UAA	avj. per farm ha.
North	254.483	34,9	1.650.935	32,2	6,5
Centre	73.718	17,9	239.769	8,9	3,3
South	337.915	25,2	758.354	11,0	2,2
ITALY	666.116	26,8	2.649.058	18,0	4,0

The number of farms by employment pattern of the farmer

District	total	on-farm only	mainly on farm	mainly off farm
North	723.132	559.235	15.472	148.425
Centre	409.122	291.871	5.845	111.406
South	1.343.021	969.802	67.655	305.564
ITALY	2.475.275	1.820.908	88.972	565.395

Through the 1993 survey some important information was gathered on the entire family of the farmer, including persons not of working age and those who, although living on the farm, did not work even a single day during the reference year.

Thus defined, there are a total of 2,475,275 farm families in which the different categories of family members (manager, wife, other family and relations) carried out altogether 371 million days of work, equivalent to 86% of the total; these were mainly attributable to the manager (49.9%).

Of the remaining 14% of work carried out by non-family labour there is temporary labour (hired daily, manual labourers and others).

As compared with 1990 there was a lower input of work (-0.7%) due exclusively to the category of non- family labour which declined by 18%, a fall only partially counterbalanced by

Days worked by category of labour

Category	1993		1990		% change on 1990
	Number	%	Number	%	
FAMILY LABOUR	370.910	85,8	368.910	83,0	0,5
- farmer	215.694	49,9	207.988	46,8	3,7
- farmer's family	155.216	35,8	160.922	36,2	-3,5
NON-FAMILY LABOUR	61.208	14,2	75.803	17,0	-19,3
- permanent workers	13.869	3,2	17.002	3,8	-18,4
- temporary workers	47.359	11,0	58.801	13,2	-19,5
TOTAL	432.148	100,0	444.713	100,0	-2,8

the increase in the volume of work carried out by the manager (0.9%).
The proportion of managers who work full-time on their own farm is 73.6% and of the remaining farmers only 22.8% carry out a different occupation for a period per year longer than that dedicated to works carried out on the farm.
Full time managers in the North are 77.3% whilst in the South the proportion falls to 72.2%.

More than two thirds of Italian farms earn no more than 4ESU, accounting for only 12.3% of total national SGM. In particular, 48.9% of farms do not even earn 2ESU and produce only 5.5% of total SGM.
In contrast, the larger farms (100 ESU and over), although only 0.9% in number, produce 23.4% of SGM with an average of 212.7ESU per farm.

Number of farms and SGM (*) by class of economic size

Class of economic size	1993 Survey Farms	1993 Survey SGM	Avj. SGM per farm	Census 1990 Farms	Census 1990 SGM	Avj. SGM per farm
Less than 2 ESU	1.199.735	1.049.672	0,9	1.311.590	1.113.606	0,8
2- <4	457.811	1.283.354	2,8	478.916	1.343.225	2,8
4- <8	326.256	1.833.431	5,6	357.899	2.003.013	5,6
8- <16	219.797	2.486.557	11,3	233.694	2.612.772	11,2
16- <40	165.395	4.045.479	24,5	170.049	4.183.698	24,6
40 - <100	64.213	3.802.648	59,2	64.421	3.846.665	59,7
Over 100 ESU	20.873	4.440.482	212,7	22.481	5.012.783	223,0
TOTAL	2.454.080	18.941.623	7,7	2.639.050	20.115.762	7,6

(*) For the definition of SGM and ESU see Appendix.

and by type of farming

Type of farming	1993 Survey Farms	1993 Survey SGM	SGM per farm	1990 Census Farms	1990 Census RLS	Avj. SGM per farm
Arable	579.315	4.513.923	7,8	685.418	4.902.117	7,2
Flowers and vegetables	32.467	1.466.013	45,2	45.221	1.548.813	34,2
Permanent crops	1.088.647	6.079.616	5,6	1.105.603	6.429.907	5,8
Herbivorous animals	281.026	2.894.819	10,3	269.589	2.881.319	10,7
Granivorous animals	11.302	500.290	44,3	12.319	579.094	47,0
Mixed crops	286.254	1.944.983	6,8	317.460	1.994.792	6,3
Mixed livestock	41.153	434.333	10,6	55.890	448.508	8,0
CROPS AND LIVESTOCK	133.916	1.107.646	8,3	147.550	1.331.212	9,0
TOTAL	2.454.080	18.941.623	7,7	2.639.050	20.115.762	7,6

In terms of types of farm, there is widespread cultivation of permanent tree crops in Italy (especially olives and vineyards) which involves 44.4% of farmers who, however, obtain only one third of SGM per farm from them.

The most profitable crops are fruit, vegetables and flowers together with grain-fed animals (pigs and poultry); where they prevail, these contribute to obtaining an average farm SGM of 45 ESU.

ECONOMIC PERFORMANCE - RESULTS FROM THE FADN

Farm Incomes in 1993

The Farm Accounting Data Network was established at Community level by Regulation 79 of 1965 and its main objective is the systematic collection of information necessary to measure trends in farmers' incomes and in the performance of farm enterprises.
At present in Italy about 19,000 farms are included in the survey sample. The Regional administration and farmers' organisations take part in the collection of data; accounting methods and procedures are those of INEA which is also responsible for coordination between the Italian state and the EU for management of the Network.
The farms which take part in the FADN are subjected to a system of survey which illustrates their structural characteristics, factor endowment and cost structure.
All this information is available on computer systems at each regional office of the INEA.

Average farm data by altimetric zone, 1993

Zone	No. farms	UAA ha.	WU n.	VFO	Variable costs	Fixed cost	Net income
					000 lire		
TOTAL	18.869	18,30	1,77	75.643	34.522	18.063	31.226
Mountains	4.015	22,61	1,76	59.971	29.612	16.176	24.493
Hills	9.240	17,41	1,73	62.926	26.155	15.224	26.795
Plains	5.614	16,68	1,84	107.781	51.802	24.084	43.333

Average farm data by district, 1993

District	No. farms	UAA ha.	WU n.	VFO	Variable costs	Fixed costs	Net income
					000 lire		
TOTAL	18.869	18,30	1,77	75.643	34.522	18.063	31.226
North	7.296	18,21	1,99	108.166	53.260	26.283	41.834
Centre	3.469	19,91	1,87	65.449	27.076	19.495	24.349
Soth	8.104	17,70	1,53	50.725	20.839	10.048	24.619

Data by district-changes 1993/92

District	VFO		%. change	Variable cost		% change	Fixed cost		%. change	Net income		% change
	1992	1993		1992	1993		1992	1993		1992	1993	
TOTAL	69.214	75.643	9,3	33.014	34.522	4,6	16.631	18.063	8,6	27.773	31.226	12,4
North	98.758	108.166	9,5	51.066	53.260	4,3	24.131	26.283	8,9	37.452	41.834	11,7
Centre	63.345	65.449	3,3	26.546	27.076	2,0	17.575	19.495	10,9	24.646	24.349	-1,2
Soth	44.876	50.725	13,0	19.561	20.839	6,5	9.253	10.048	8,6	20.394	24,619	20,7

Average farm data by ESU, 1993

	No. farms	UAA ha.	WU no.	VFO	Variable costs	Fixed costs	Net income
						000 lire	
TOTAL	18.869	18,30	1,77	75.643	34.522	18.063	31.226
2-4 ESU	1.218	5,18	1,05	16.362	6.035	5.160	6.714
4-8 ESU	3.838	8,63	1,24	24.735	10.082	7.465	9.984
8-16 ESU	5.835	14,23	1,55	44.185	18.409	12.005	18.735
16-40 ESU	5.533	23,39	1,98	86.311	38.679	20.800	36.451
40-100 ESU	2.027	33,86	2,75	191.627	92.717	41.159	77.903
over 100 ESU	418	59,42	4,33	451.276	229.613	89.289	176.527

Average farm data by principal types of farm, 1993

	No. farms	UAA ha.	WU no.	VFO	Variable costs	Fixed costs	Net income
						000 lire	
TOTAL	18.869	18,30	1,77	75.643	34.522	18.063	31.226
Arable	4.671	20,57	1,56	66.303	24.898	17.043	25.852
Horticultural	1.242	1,77	2,14	96.450	37.106	19.111	40.357
Permanent crops	4.635	8,45	1,61	51.706	15.456	15.109	21.375
Herbivorous animals	4.126	32,11	2,03	113.093	65.948	22.994	49.551
Granivorous animals	42	8,59	2,05	379.014	225.769	25.296	134.401
Mixed crops	1.928	12,69	1,67	50.986	19.038	14.559	19.751
Mixed livestock	494	19,02	1,94	66.208	35.891	16.903	27.362
Mixed	1.731	23,82	1,93	83.536	46.995	20.270	33.254

PRODUCTS
OF DESIGNATED ORIGIN
AND WITH
SPECIFIC CHARACTER

Products of Designated Origin

The European Union definition

Under present conditions national and Community regulations for recognition and protection of designations of origin have an important role to play both in differentiating supply at firm level and as an instrument for increasing the competitive capacity of the national agro-food system. In particular, the recent EEC Regulations 2081 and 2082 issued by the Council of Ministers on 14th July 1992 concerning the definition and regulation of DPO (designation of protected origin) and PGI (protection of geographical indications) and certificates of specific character constitute the basis for administering the measure of protected designation with the specific aim of contributing to the promotion of typical products.

***Designation of protected origin (PDO) and protected geographical indication (PGI)** differ in that in order to obtain recognition of the first of these, all phases of production and processing must take place in a limited geographical area, whilst for the second, it is sufficient that the quality or reputation can be attributed to the geographical origin whilst some part of the production process may take place outside that area.*

***The certificate of specific** character refers to an element or a set of elements which distinguish an agricultural or food product from analogous products belonging to the same category; in effect, it is a characteristic which derives from the application of methods of production and products whose specific character derives from their geographical origin or from the application of technical innovation are excluded.*

The specifications of the product must supply all the indications necessary for recognition and constitute the indispensable basis for the declaration of conformity of the product.

Community regulations assign to Management Consortia, whose responsibilities are set out by each member state, the task of guaranteeing that products carrying the mark of the protected origin or attestation of specificity correspond with the standards laid out in the specification

The law governing the denomination of controlled origin for cheeses dates back to 1954 and it was the first to be applied in our country.
The law of 10th April 1954, no. 125, recognises as products with designation of origin those cheeses produced within a limited geographical area, consistently using local methods and whose characteristics derive mainly from the specific conditions of the environment in which they are produced.
The same law recognises as products of specific character those cheeses produced on national territory consistently using local methods and whose characteristics derive from particular techniques of production.
It also provides for the establishment of particular consortia to supervise the correct application of the norms.

Cheeses with designation of origin

Asiago	*Mozzarella di bufala campana*
Bra	*Murazzano*
Caciocavallo Silano	*Parmigiano Reggiano*
Caciotta d'Urbino	*Pecorino Romano*
Canestraro Pugliese	*Pecorino Sardo*
Castelmagno	*Pecorino Siciliano*
Fiore Sardo	*Pecorino Toscano*
Fontina	*Provolone Valpadana*
Formai De Mut dell'alta Valle Brembana	*Quartirolo Lombardo*
Gorgonzola	*Raschera*
Grana Padano	*Robiola Roccaverano*
Montasio	*Taleggio*
	Toma Piemontese

Other Products

The following products have been recognised, by appropriate laws, as being of designated origin:

- *Prosciutto di Parma*
- *Prosciutto di San Daniele*
- *Prosciutto Berico - Euganeo*
- *Prosciutto di Modena*
- *Salame di Varzi*

Products of protected geographical origin - PGI

- *Nocciola (hazel nuts) del Piemonte*
- *Fungo (mushrooms) di Borgotaro*
- *Cappero (capers) di Pantelleria*
- *Castagna (chestnuts) di Montella*
- *Arancia Rossa (red oranges) di Sicilia (approval procedure under way)*

Other PDO products

- *Aceto balsamico (aromatic vinegar)*
- *Aceto balsamico tradizionale (traditional aromatic vinegar) di Modena e di Reggio Emilia*

Wines of designated origin

The law of 10th February, 1992, no.164 regulates designation of origin for wines. By designation of origin for wines is understood the geographical name of a particular wine producing area, used to indicate a well-known quality product whose characteristics are dependent on the natural environment and skills.By typical geographical indication for wines is understood the geographical name of an area used to indicate the product emanating from it.

These products are classified into

- *designation of controlled and guaranteed origin (DOCG)*
- *designation of controlled origin (DOC)*
- *typical geographical indication (IGT)*

Italian DOC wines by Region

Valle d'Aosta	*1*	*Umbria*	*8*
Piemonte	*34*	*Lazio*	*19*
Liguria	*4*	*Abruzzo*	*2*
Lombardia	*13*	*Molise*	*2*
Trentino - Alto Adige	*8*	*Campania*	*13*
Veneto	*17*	*Basilicata*	*1*
Friuli - Venezia Giulia	*8*	*Puglia*	*24*
Emilia Romagna	*14*	*Calabria*	*8*
Toscana	*22*	*Sicilia*	*10*
Marche	*10*	*Sardegna*	*18*

N.B.There are altogether 230 DOC wines in Italy, less than the sum for the Regions, since some are inter-Regional.

Wines with designation of controlled and guaranteed origin

Regions		*Designation*	Additional indication permitted on label
PIEMONTE	b/s	Asti spumante o Asti	
		e Moscato d'Asti	
	r	Barbaresco	riserva
	r	Barolo	
	r	Gattinara	riserva
EMILIA ROMAGNA	b/p	Albana di Romagna	
TOSCANA	r	Brunello di Montalcino	riserva
	r	Carmignano	riserva
	r	Chianti	classico, riserva Colli Aretini, Colli Fiorentini
			Colline Pisane, Colli Senesi, Montalbano, Ruffina
	b	V ernaccia di San Gimignano	riserva
	r	Vino nobile di Montepulciano	riserva
UMBRIA	r/p	Montefalco Sagrantino	
	r	Torgiano	riserva
CAMPANIA	r	Taurasi	riserva

b/s = sparkling white b/p = sweet white (passito) r = red r/p = sweet red (passito)

Virgin and Extra-Virgin Olive Oils

The recognition of designation of origin for virgin and extra-virgin olive oils is regulated by the law 169/92.

By designation of origin for virgin and extra-virgin olive oils is meant the geographical name which defines an area characterised by specific natural or human factors used to designate virgin and extra-virgin oils originating from there and whose characteristics are due essentially to the olive groves from which the basic material is drawn and to the techniques of production.

Such a denomination is reserved for oils which meet the conditions and the requisites established in the relative specifications for production.
In order to regulate the use of designations of origin, consortia of oil producers have been established and recognised.

A national committee for supervising designations of origin for oils has been established, based at the Ministry of Agricultural, Food and Forestry Resources in order to examine specifications of production and to promote research and propaganda for improving and disciplining production of oils.

In order to implement the law, decrees subsequently established:

- *a national register of tasters of olive oils (23.6.1993)*
- *norms for recognition of PDO, for the register of olive groves, for the declaration of oil production, for the list of varieties of olives admitted to the register of olive groves, for the activity of the commission for tasting oils.*

So far, the following proposals for specifications have been presented to the national Committee for the management of PDO virgin and extra-virgin olive oils:

- *Toscano*
- *Sabina*
- *Brunzio*
- *Lametia*
- *Val di Mazzara*
- *Valli trapanesi e Monte etnea*

INSTITUTIONS AND LEGISLATION

The Framework of Responsibilities

The framework of responsibility as regards agriculture is regulated by the following laws:

- *Law no.281 of 16th May 1970 and the subsequent Presidential decree no. 11 of 15th January 1972*
- *Law no.382 of 22nd July 1975 and the subsequent Presidential decree no. 616 of 24th July 1977.*

As stated in article 4 of the Presidential decree 616/77 "the Central Government shall excercise the function of guiding and coordinating... and, also for those areas of responsibility transferred or delegated, functions concerning international relations, those with the European Economic Community, national defence and public security".

Both transfer to the Regional authorities the greater part of responsibility for agriculture. Thus all the measures most directly related to production have become subject to Regional intervention, including:

- *Crop production and livestock rearing;*
- *Collection, processing and distribution of produce;*
- *Extension and professional training;*

In particular, in agriculture, the main responsibilities of the Central authorities concern;

- *research, experimentation and information of national interest;*
- *measures of national interest for regulating agricultural markets;*
- *guarantee of security in supplies;*
- *the organisation of international trade;*
- *the fund for national solidarity in case of catastrophe or adverse climatic conditions;*

The Law of 4th December, 1993, no. 491

Reorganisation of national and regional competencies as regards agriculture and forestry and the establishment of the Ministry for Agricultural, Food and Forestry Resources.

Activities concerning agriculture and forestry, aquaculture and agrotourism, as well as those relating to territorial conservation and development are the competence of the Regional authorities.

In the above-mentioned areas, the Ministry performs the following functions:

- *it takes care of international relations and participates in drawing up Community policies;*
- *it makes the necessary arrangements for implementing Community measures;*
- *it defines national policies, including planning and activities of direction and coordination, the collection, processing and diffusion of information and data.*

The Law institutes various specific Permanent Committees for determining objectives and general directives for agricultural, food and forestry policies, to be advocated at national, Community and international level:

- *the Permanent Committee on agro-food and forestry policies (art.2 comma 6)*
- *the Permanent Committee for veterinary and livestock problems;*
- *the Permanent Committee on services for the industrial processing of agricultural and forestry products (art. 4)*
- *the National Council for agro-food research (art.6 comma 2,D);*

It is established by law that the quota of financial resources attributed to the Ministry for measures relating to its responsibilities (foreseen by planning laws) cannot exceed 20%.
In addition, provisions are made for reform of the National Forest Guard, the Agricultural Intervention Board, the Central Inspectorate for the Repression of Fraud and for the re-organisation of the Agricultural Research Institutes and other research institutes under the supervision of the Ministry (INEA and ISMEA).

During 1994 the legislative process necessary for carrying out the institutional changes specified in the law continued.

The Presidential decree no.197 of 15th March 1994 lays out the Regulation concerned with the norms for organising the offices of the Ministry and, in fact, the following Directorates-General have been established:

- *DG for Community and international policies*
- *DG for national agricultural and agro-industrial policies*
- *DG for forestry, mountain and water resources;*
- *DG for fishing and aquaculture*
- *DG for personnel and general services.*

Rules have been completed governing the working of the Permanent Committee for agro-food and forestry policies established by the above-mentioned law.

This Committee has met once a month and has dealt with the preparation of a parliamentary bill concerning the new multi-year law for planned measures in agriculture and the approval of the definitive text of the national Programme for services for agricultural development which was approved by the Interministerial Committee for Economic Planning on 10.05.1995

The GATT Agreement

After several years of negotiation, at the end of 1993 the general agreement on international trade, known as the Uruguay Round, was ratified and this presents important innovations for the agricultural sector.

The general contents of the agreement are:

- *The establishment of a World Trade Organisation (WTO) which, in fact, transforms the GATT from a simple agreement into an operative organisation.*
- *Reduction of customs duties, the "classical" concern of GATT, on imports of industrial products.*
- *Submission of new areas of activity to GATT agreements and to the discipline of the WTO.*

As regards agriculture, the objectives of the agreement concern the creation of an equitable trading system for agricultural products which respects the needs of developing countries and protects those importing countries which are penalised by variations in prices.

The agreement is essentially based on five points:

- *reduction of production and export subsidies: in six years the volume of subsidised exports must fall by 21% and the value by 36%.*
- *continuation of domestic support which has no relevant effect on international trade, having no impact on the final price (e.g. direct farm income support or incentives to abandon cropland). Other domestic subsidies must be reduced by 20%.*
- *elimination of import quotas by conversion into tariff equivalent which should then be reduced by 36% in six years (24% in 10 years in developing countries)*
- *a peace clause (9 years) to avoid unilateral retaliation*
- *food aid and subsidies for the "losing" countries in the Round, in other words developing countries which are net importers of products whose prices will increase following the liberalisation of trade*

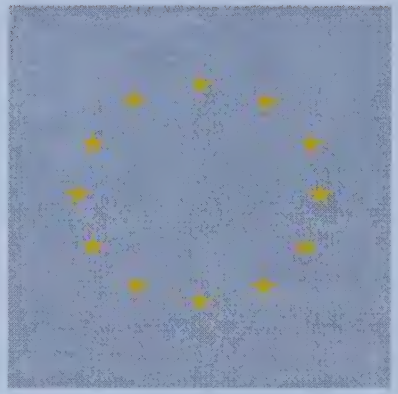
The reform of the CAP, which came about also as a result of the pressure from the GATT negotiations, has, to some extent, anticipated some of the measures of the agreement.

The Common Agricultural Policy

In recent years the Common Agricultural Policy (CAP) has been subject to change in order to adapt to new circumstances as well as to the evolution of markets and of technology.

Great efforts have in fact been made to limit surplus production and expenditure and to avoid a decline in farm incomes.

The first measures for reform were taken in 1979. In the face of continuous increases in the surplus of dairy products it was decided to apply a co-responsibility levy; in 1984 quotas for dairy produce were established and in 1988 the mechanism of automatic stabilisers was introduced.



In June 1992 the Council approved the most radical reform package since the introduction of the CAP thirty years earlier.

The main objectives of the reform were:

- *to enable the Community to preserve its position as an important producer and exporter of agricultural products and to become more competitive on both home and export markets;*
- *to reduce output to a level nearer to market demand;*
- *to give priority, in the erogation of income aids, to those farmers with the greatest need;*
- *to encourage farmers to remain in the countryside;*
- *to protect the environment and to develop the natural potential of rural areas.*

Set-aside in 1994

	Simplified regime		General regime	Total
Applications	599.173		63.534	662.707
Cereals area (ha)	2.707.785		875.370	3.583.155
Oilseeds area (ha)	13.059		348.886	361.945
Proteins area	27.625		6.045	33.670
Set-aside (ha)	5.517		248.313	253.830
Total area (ha)	2.753.986		1.478.614	4.232.600
Area (ha) under hard wheat				
Simplified regime	1.127.921			
General regime	274.070			
Total	1.401.991			
Arable sector - 1994 harvest				
No. of applications paid	588.660	Sum paid	2.391,3 billion	
Livestock sector - 1993				
No. of cattle farmers	89.200	Sum paid	199,5 billion	
No. of sheep farmers	93.955	Sum paid	348,4 billion	

The central element of the reform package pivots on certain key products for which a reduction in price is foreseen, and on the withdrawal of land from production.
Farmers will receive direct compensation for loss of income.
The measures apply to land under cereals, oilseeds and protein crops as well as to beef.The new CAP has had effectin the arqable sector starting from 1993-94.
This sector includes cereals,oilseeds and protein plants and represents more than 10% of marketable production in Italy.
The new policy of support for these crops foresees a gradual reduction in indicative and intervention prices (so as to bring them more into line with world prices), compensated by direct aid to incomes, calculated as per hectare payments on the basis of past yields, differentiated according

to a plan of regionalisation of national territotry which divides Italy into 254 homogeneous areas.

In order to define the aid and the obligations associated with it, producers have been divided into two principal categories, subject to two different regimes: large producers to whom the general regime applies, and small producers, to whom a simplified regime is applied.

The former are producers who request aid for an area which, on the basis of the plan of regionalisation, gives rise to production of more than 92 tons; the latter are producers who, on the basis of the yields in the plan of regionalisation, request aid for an area which renders less than 92 tons.

The difference between the two regimes consists in the fact that in the general one (large producers) compensation is differentiated by crop

Applications of the CAP in the reform of the arable sector

Country	Basic area (1)	Area under cereals, oilseeds and protein crops % Five-year set-aside	Simplified regime	General regime
EU	49.033	1.297	26,5	73,5
Belgium	479	1	63,4	36,6
Danmark	2.018	6	20,6	79,4
Germany	10.156	221	20,9	79,1
Greece	1.492	-	89,2	10,8
Spain	9.200	68	25,1	74,9
France	13.256	190	16,6	83,4
Ireland	346	-	31,0	69,0
Italy	5.801	711	64,9	35,1
Lussemburgo	43	-	64,9	35,1
Netherland	437	4	77,6	22,4
Portugal	1.054	-	42,3	57,7
United Kingdom	4.461	88	6,6	93,4

(1) As set out in EEC Regulation 1098/94 and 1000/94.

and there is an obligation to set-aside 15% of the area for which aid is requested, whilst in the simplified one, (small producers) there is only one level of compensation, independently of the type of crop,(although supplementary aid per hectare for hard wheat remains in the specified areas particularly suitable for it) and there is no obligation to undertake set-aside.

The prices for beef will also be reduced by 15% within three years.

This reduction will be compensated by supplementary premia for cattle raised on open pasture so as to encourage extensive farming; no premia will be paid to farmers raising cattle in sheds in that the fall in price will be compensated by lower prices for cereal feedstuffs. In 1994 662,707 applications for compensatory payment were presented to the Intervention Board; of these, 90% were in connection with the simplified regime.

Oilseed producers, on the other hand, adhered in mass to the new CAP, requesting aid for all the cultivated area, and for the most part they opted for the general regime: as much as 96% of the area sown to oilseeds has been cultivated under the general regime.

As regards set-aside, altogether, between the simplified regime (optional) and the general regime (obligatory), only 6% of the areas for which compensation was requested was actually withdrawn from production. The change in the market mechanisms for individual products has been flanked by a series of "accompanying measures" which generate both compensatory and structural effects:

Regulation 2078/92

- *developing environmentally compatible agriculture through reduced use of fertilisers and pesticides*

Regulation 2079/92

- *encouraging the early retirement of farmers of 55 years and over to make room for young farmers*

Regulation 2080/92

- *financing re-afforestation schemes and rationally managing lands withdrawn from production.*

Following Reg.2078/92 all Regions have drawn up regional agro-environmental programmes which

have been approved by the European Commission and at 31.5.95 only the programmes for Puglia and Campania remained to be approved. A programme of national aid has been drawn up in connection with Reg.2079/92, between the Regions and the Ministry for Agricultural, Food and Forestry Resources and is known as the national programme for early retirement in agriculture.

As regards Regulation 2080/92, on 8th April 1994 the Permanent Committee for Forestry approved regional programmes presented by Valle d'Aosta, Piedmont, Lombardia, Liguria,the Autonomous Province of Bolzano, Veneto, Friuli Venezia Giulia, Emilia Romagna, Marche, Umbria, Tuscany, Lazio, Abruzzo,Molise, Campania, Puglia, Calabria, Sicily and Sardegna.Overall investment expenditure (Community plus national quotas) is estimated as about 1,000 billion lire for the period 1994-97.

Structural Funds for Agriculture

On 20th July, 1993, the EEC Council of Ministers promulgated six Regulations on the basis of the reforms to the Common Agricultural Policy set under way by the Community in 1992, which were intended to discipline the structural funds for the period 1994-99.

The structural funds of the Community are the following:

- *EEC Regulation 2080/93 of the Council, dispositions for applying the EEC Regulation 2052/88 as regards the financial measures for fishing (EFF).*
- *Framework Regulation 2081/93 which modifies the EEC Regulation 2052/88 concerning the emission of funds for structural purposes, their effectiveness and the coordination of their related measures and those of the European Investment Bank and other existing financial measures.*
- *EEC Regulation 2083/93 which modifies EEC Regulation 4253/88 relating to provisions for applying EEC Regulation 2052/88 as regards coordination between measures from the various structural funds on the one hand and between these measures and those of the European Investment Bank and other existing financial measures on the other.*
- *EEC Regulation 2083/93 which modifies EEC Regulation 4254/88 relating to provisions for the application of the EEC Regulation 2052/88 as regards the European Development Fund.*
- *EEC Regulation 2084/93 which modifies EEC Regulation 4255/88 relating to the application of EEC Regulation 2052/88 as regards the European Regional Fund (EFRD).*
- *EEC Regulation 2085/93 which modifies EEC Regulation 4256/88 relating to application of EEC Regulation 2052/88 as regards the Orientation Section of EAGGF.*

The Community objective is to reinforce its economic and social cohesion, contributing, at the same time, to the regional rebalancing of the Community.

In the proposals for modifying the Regulations the priority objectives have been indicated that the Community intends to finance with the structural funds available and the criteria it will follow for the erogation of such funds put at the disposal of the member states for a period of six years.

AGRICULTURE

2328/91 (*)	improving the efficiency of agrarian structures
2078/92	methods of agricultural production compatible with environmental protection
2079/92	aid for early retirement in agriculture
2080/92	aid to forestry measures in the agricultural sector
2088/85	integrated Mediterranean programmes
2081/93	the emission of structural funds, their effectiveness, coordination with EIB and other financing agents
866/90	improvement of conditions for marketing and processing agricultural products
867/90	improvement of conditions for marketing and processing forestry products
1401/86	action for improving agriculture in some less-favoured areas of northern Italy
768/89	transitional aid to agriculture
1360/78	producers' associations and their unions
1035/72	producers' organisations in the horticultural sector

Structural measures for limiting production

1422/88	premia for eliminating vineyards
822/87 2741/89	national aid for planting vineyards
1200/90	improving Community production of apples
2066/92	premia for raising cattle for beef and for dairy production
336/86	compensation for abandoning milk production
3493/90	premia for raising sheep and goats

FISHING AND AQUACULTURE

2080/93	funding for fisheries

PROGRAMMES OF COMMUNITY INITIATIVE

Leader II	coordination between initiatives for rural development in support
Pesca	of restructuring in the fishing sector

(*) codifying Reg. 797/85 and successive changes, modified by 2843/94.

Structural funds - availability of finance, 1994-99

	Funds in million ECU					(*) Total investment (000 £)	% (2)
	Public expenditure			Private	Total investment		
	FEOGA quota	National quota	Total				
	1	2	3 = (1+2)	4	5 = (3+4)	(4)	
Objective 1	2.228,0	1.130,6	3.358,6	907,6	4.266,2	8.009.141.803	30,18
Objective 5B	410,8	499,0	909,8	799,3	1.709,1	3.208.610.800	13,32
Objective 5A (1)	680,0	1.192,2	1.872,2	922,1	2.794,3	5.273.802.386	31,92
Leader II (**)	285,9	176,4	462,3	243,3	705,6	1.409.307.506	4,71
Reg. 2078/92 (3)	650,0	439,6	1.089,6	0,0	1.089,6	2.056.469.771	11,73
Reg. 2079/92 (3)	176,6	115,3	291,9	0,0	291,9	550.917.465	3,08
Reg. 2080/92 (3)	300,0	193,7	493,7	0,0	493,7	931.712.875	5,17
Grand total	4.731,3	3.746,7	8.478,0	2.872,3	11.350,3	21.439.962.605	100,00

(*) 1 ECU= 1,887.35 lire.
(1) Regions excluded from Objective 1.
(2) Percent of national quota.
(3) Structural measures referred to EAGGF Guarantee, period 1994-97.
(4) Total investment in '000 lire (Col. 5) with exchange rate 1 ECU=1,887.35 lire.
(**) Exchange rate 1 ECU=1,997.45 lire.

The combination of different structural funds is admitted; the EIB contributes with loans for achieving five objectives.
The funds can co-finance operative programmes, global subsidies as well as be used in conjunction with national aid compatible with EEC policy and can be utilised for granting loans for extension and preparatory studies.

The Ministry for Agricultural, Food and Forest Resources, together with interested Regions, has taken steps to receive Community indications into national provisions as regards those aspects which affect agriculture.

Community structural funds

Objective 1

is the section of structural funds (UE financing for regional development) allocated to areas with retarded development. Areas entitled to receive such aid in Italy for the period 1994-99 are:Abruzzo (until 1996), Basilicata, Campania, Molise, Puglia, Calabria, Sicily, and Sardinia. The Regions in question must draw up Multi-fund Operative Programmes which provide for activity designed for diversification, enhancement of agricultural resources and rural development; these must subsequently be approved by the EU.

Objective 5b

is the section of Community funds designated to the areas of the Centre-North of Italy through programmes of rural development. During 1994 the Commission of the EU has approved the "Single Planning Documents " of the 13 Regions involved in Objective 5b.

Objective 5a

is the section of structural funds designated specifically to innovative investment in the rural environment. They are divided into two sections, those destined to development plans for farms (Reg 2328/91) and the rest destined to agro-industry (Reg 866/90). The first section has, however, gained precedence, with 72.7% of the funds assigned. In fact, 680 million ECU are available

Structural Policy in the Community: objectives and measures

Objectives	Funds to be utilised
Objective 1	EFRD EDF EAGGF/Orientation
To promote the development and adjustment of regions with retarded development	
Objective 2	EFRD EDF
To reconvert regions or parts of them particularly hit by industrial decline	
Objective 3	EDF
To combat long-term unemployment, to facilitate the employment of young people and the integration into the labour market of persons threatened by social emargination	
Objective 4	EDF
To facilitate the adjustment of workers to industrial change and the evolution of systems of production	
Objective 5	a-EAGGF/Orientation, EFF b- EAGGF/Orientation, EDF,EFRD
To promote rural development a- to accelerate structural adjustment in the framework of the reform of the CAP b- easing the structural adjustment of rural areas	

to Italy for agriculture and 118.6 million for fishing; they are managed principally at Regional level.
Particular importance is attatched to the Multi-regional Operative Programmes foreseen within the Community framework of support and which involve mainly the Southern regions where the need for further support and for combined action between State and Regions as regards services for agricultural development is most felt. Two operative programmes have been drawn up and have been submitted for approval to the EU:

- *Services for the development of agriculture and for extension;*
- *Rationalisation of trading channels for agricultural produce from the South.*

Finally, the Community initiative LEADER must be mentioned; it is a specific action for rural development which affects all regions of Italy. Regional programmes are used as the instrument for promoting integrated development projects (agriculture, tourism, environment, crafts, services etc.) which are carried out either by public or by private agents denominated Local Action Groups.

Law 752/86 (*) and Law 201/91

In 1994, as has been the case since 1986, financial intervention in the sector has been carried out mainly through the Law 752/86, that is through its two year prorogation, Law 201 of 10th July 1991.
On 2nd June 1994, the CIPE (Interministerial Committee for Economic Planning) allocated 1,028 billion lire between Regions, Autonomous Provinces and the State.
The allocation was effectuated following the procedures laid down by the Law 491/93 which attributes to the central administration not more than 20% of available resources; the Ministry received 204 billion lire and the remaining 824 billion went to the Regions and to the Autonomous Provinces.
On 11th October 1994, the CIPE approved two specific plans,one for measures in the potato sector and the other in the sector for flowers and ornamental plants.

Finance erogated under Law no. 752/86

CIPE deliberation	Allocation (million lire)
17 December 1986	2.765
23 April 1987	2.993
14 June 1988	3.250
2 May 1989	3.292
15 May 1990	3.029
2 August 1991	3.052
31 January 1992	1.000
13 July 1993	1.781
2 Giugno 1994	1.028

(*) Law 752 of 8th November 1986 "The law on expenditure over several years for measures programmed for the agicultural sector".

As regards legislation, two important measures must be recorded:

- *DPR of 8th August 1994, n. 376, which disciplines the reproduction of seed potatoes:*
- *DPR n. 348 which disciplines procedures for designated origin in the wine sector.*

The National Plan for Forests

This plan was envisaged in article 2 of the law no. 752/86 and was approved by the CIPE in December 1987. The objectives include the establishment of consortia for the management of forest resources, measures to help firms as regards technological development and the maintenance and development of forests, a policy for the improvement of infrastructure, the establishment of urban parks.

Law no. 183/87

This guarantees finance for Community Regulations through a rotating fund at the Ministry for the Treasury. With reference to this law, on 12th August, 1992, the CIPE allocated 470 billion lire, the greater part of which in support of Regulation 1094/88 (set-aside) and of Regulation 2052/88 (reform of structural funds).

Law no. 88/88

This law concerns inter-professional agreements and contracts for the cultivation and sale of agricultural products for processing or for marketing unprocessed. The law attempts to regulate supply so as to bring it into line with demand in foreign and domestic markets, to improve the quality of production, to establish criteria and general conditions for production and sale of products and for supplying services, to fix product prices in advance or criteria for the determination of prices. The Ministry may intervene in establishing agreements, in particular as regards the product concerned, the method and timing of delivery, the minimum price, the method and timing of payment, quantity and quality requirements, the period for stipulating contracts.

Law no. 87/90

Law no. 87 was approved on 9th April 1990 for "urgent measures in the livestock sector" aimed at restructuring production and marketing in the sector in order to adapt to the needs of the market.
To this end, a five-year fund has been established at the Ministry for Agriculture and Forests with a dotation of 340 billion lire.

Law no. 181/82

"Arrangements for drawing up the annual and pluri-annual State budget". This established the Fund for Investment and Employment, implemented by the Ministry for the Budget.
For agricultural projects a consultative liaison committee was established within the Ministry for Agriculture and Forests.

Law no. 185/92

On 14th February Law 185 concerning the "New discipline for the Fund for National Support" which had been established under the Law 364/70. This Fund supplies sums necessary for dealing with damage caused by natural disasters or exceptionally bad weather to infrastructure, farm structures or agricultural production in the areas affected, excepting livestock production.

The measures foreseen are: for emergency aid (erogation of a single contribution which will partially cover the damage); contributions on capital account; loans at subsidised rates of interest for reconstituting working capital; short term loans etc.

As a result of this Law, the dotation of the Fund, which is attributed to the Ministry, has been increased by 170 billion lire for each of the years '92, '93 '94. In 1993 the sum of 390 billion lire has been allocated for measures to compensate damage to farms and 280 billion for contributions towards farm crops.

APPENDIX

Glossary

Intermediate agricultural inputs
Expenditure on intermediate agricultural inputs is that for seed, fertilisers, pesticides, feed compounds and other expenditure for livestock, energy, irrigation water and various services.

Agricultural contracting
Is the supply of labour to third parties by appropriately qualified firms, with or without the use of agricultural machinery.

Production subsidies
Premiums and payments erogated by public bodies in favour of the agricultural sector.

Fixed costs
Costs incurred for employing factors of production with lives of several years:amortisation, interest, land rents, expenses connected with labour employed on a permanent basis.

Variable costs
Costs incurred for the employment of single use factors of production:seeds, fertilisers, pesticides, energy, hiring charges, casual labour.

Types of enterprise

- *owner-operator*
- *farms with hired labour and/or share-croppers*
- *share-tenancy*
- *other forms*

TF
Types of farming
The classification of farms by type of farming is based on determination of the economic performance of the various productive activities carried out on the farm and the combination of these activities.
For this purpose, the numbers of hectares cultivated or livestock raised are multiplied by the SGM of the zone in which the farm is located.
The resulting combination is compared with a typology classification scheme which is used to define the TF on the basis of criteria defined at Community level and is valid for official statistics.
A farm is classified as specialised when the SGM of one activity or of several similar activities exceeds 2/3 of total SGM on the holding.

GDP
Gross Domestic Product
Is the outcome of productive activities carried out on national territory; it is equivalent to the overall value of goods and services produced within a determined territory within a specified period of time, which is usually a calendar year.
It does not include the value of intermediate output.

VFO
The value of final output

Is the value of production that can be sold and therefore, in agriculture, it is equal to the harvested crop minus the share reused on the holding as a means of production.

SGM
Standard Gross Margin

This is the parameter determined for each productive activity by the difference between the value of final output and the sum of certain specific costs (seed, fertiliser, pesticides, feedstuffs, forage etc.), excluding those for labour and machinery.
Gross margins calculated in this way are defined as "standard" in that the value of final product and costs are calculated on a three- year average, with reference to the altimetric zone of each region. The SGM are expressed in European Currency Units (ECU) and up-dated by INEA when surveys of farm structures or the agricultural census of ISTAT take place. The sum of SGM from all the productive activities on the farm corresponds with its economic dimension and is expressed in ESU (European Size Units).

Net Income

Is the reward to all factors of production belonging to the farm entrepreneur: land, labour and capital.

UAA
Utilised Agricultural Area

Is made up of all agricultural land, permanent meadows and pasture, agricultural tree crops, household gardens and groves for (edible) chestnuts.

Total farm area

In the surveys on farm structure this means the total of UAA, cultivated woodland (woods and poplar groves), unutilised agricultural areas and other areas within the perimeter of the farm.
It differs, thus, from the definition used in annually published agricultural statistics in that in the latter case is included land abandoned and not forming part of a holding.

Access to UAA

The relationship between enterprise and farm capital. It can be:

- *ownership*
- *rent*

ESU
European Size Unit

For 1987 each Unit is equal to 1,200 ECU or 1,671,000 lire (1 ECU=1,323 lire). Thus a holding with a total SGM of 7850 ECU has an economic size of 6.54 ESU.

WU
Work unit

According to the EEC definition for the structural surveys a Work Unit is equivalent to the work of one person who is engaged for at least 2,200 hours in the course of the year.

VA
Value added

Is the sum of the difference between the value of production of goods and services from individual productive sectors and the value of intermediate goods and services used up in the period specified. It coincides with the sum of remuneration of factors of production and of depreciation in each sector.

Value added at factor cost, as distinct from that at market prices, includes any subsidies erogated by the public administration to the different productive sectors.
In contrast, in calculating value added at market prices, indirect taxes are included and production subsidies excluded.

Useful Adresses

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Via XX Settembre, 20 - Roma

REGIONAL DEPARTMENTS OF AGRICULTURE
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Basilicata
Via Anzio, 44 - Potenza
Calabria
Via S.Nicola, 5 - Catanzaro
Campania
Via Oberdan, 32 - Napoli
Emilia Romagna
Via Aldo Moro, 38 - Bologna
Friuli-Venezia Giulia
Via Caccia, 17 - Udine
Lazio
Via Rosa Raimondi Garibaldi, 7 - Roma
Liguria
Via Fieschi, 15 - Genova
Lombardia
Piazza IV Novembre, 5 - Roma
Marche
Corso Mazzini, 148 - Ancona
Molise
Via Sauro, 1 Campobasso
Piemonte
Corso Stati Uniti, 21 - Torino
Puglia
Lungomare N. Sauro, 1 - Bari
Sardegna
Via Pessagno, s.n. - Cagliari
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Viale Regione Siciliana
ang. Via Leonardo da Vinci - Palermo
Toscana
Via Novelli, 26 - Firenze
Trentino-Alto Adige
Provincia Autonoma di Trento
località Melta, 112 - Trento
Provincia Autonoma di Bolzano
Via Brennero, 6 - Bolzano
Umbria
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Quart - loc. Amerique, 127/a - Aosta
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Via Torino, 110 - Mestre

NATIONAL RESEARCII BODIES FOR AGRICULTURE
***CNR** - Roma*
Piazzale Aldo Moro, 1
***ENEA** - Roma*
Via Regina Margherita, 125
***INEA** - Roma*
Via Barberini, 36
***ISTAT** - Roma*
Via Cesare Balbo, 16
***ISMEA** - Roma*
Via Nomentana, 183
***INN** - Roma*
Via Ardeatina, 546
INFS
Istituto Nazionale per la Fauna Selvatica
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Ist. Sper. per l'Assestamento Forestale e l'Apicoltura
Trento (Villanzano) - Via Giordano, 8
Ist. Sper. per la Cerealicoltura
Roma - Via Cassia, 176
Ist. Sper. per le Colture Foraggere
Lodi (MI) - Viale Piacenza, 25
Ist. Sper. per le Colture Industriali
Bologna - Via di Corticella, 133
Ist. Sper. per la Elaiotecnica
Pescara - Via Cesare Battisti, 229
Ist. Sper. per l'Enologia
Asti - Via Pietro Micca, 35
Ist. Sper. per la Floricoltura
Sanremo (IM) - Corso degli inglesi, 508
Ist. Sper. per al Frutticoltura
Roma (Ciampino) - Via Fioranello, 52
Ist. Sper. Lattiero Caseario
Lodi (MI) - Via A. Lombardo, 14
Ist. Sper. per la Meccanizzazione Agricola
Monterotondo (Roma)
Via della Pascolare, 16 - (Via Salaria, km 29,200)
Ist. Sper. per la Nutrizione delle Piante
Roma - Via della Navicella, 2
Ist. Sper. per l'Olivicoltura
Cosenza - Via Silvio Pellico, 50
Ist. Sper. per l'Orticoltura
Pontecagnano (SA) -Via Cavalleggeri, 25
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Roma - Via Carlo G. Bertero, 22
Ist. Sper. per la Selvicoltura
Arezzo - Via s. Margherita, 80-82
Ist. Sper. per lo Studio e la Difesa del Suolo
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Ist. Sper. per la Viticoltura
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CIFDA Abruzzo-Campania-Molise
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CIFDA Metapontum Basilicata-Calabria-Puglia
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CIFDA Italia Centrale
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Regione Sardegna
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Hotel Azzolini Palm Beach
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CIPA/AT
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INIPA
Roma - Via XXIV Maggio, 43

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Azienda di Stato per gli Interventi nel mercato Agricolo
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Cassa per la Formazione della Proprietà Contadina
Roma - Via Nizza, 128
Consorzio Nazionale per il Credito Agrario di Miglioramento
Roma - Viale Castro Pretorio, 118
Ente Nazionale Cellulosa e Carta
Roma - Viale Regina Margherita, 262/e
Ente Nazionale Previdenza e Assistenza per gli Impiegati dell'Agricoltura
Roma - Viale Beethoven, 48
Ente Nazionale Risi
Milano - Piazza Pio XI
Ente Nazionale delle Sementi Elette
Milano - Via F. Wittgens, 4

FATA
Fondo Assicurativo Agricoltori
Roma - Via Urbana, 169
FAO
Food and Agriculture Organitation of the United Nations
Roma - Viale Terme di Caracalla
ICE
Istituto Commercio Estero
Roma - Via Listz, 21
INEMO
Istituto Nazionale Economia Montana
Roma - Piazza della Rovere, 104
SCAU
Servizio Contributi Agricoli Unificati
Roma - Via Barberini, 67
Società Agricola Forestale per le Piante da Cellulosa e Carte
Roma - Via dei Crociferi, 19
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Collegio dei Periti Agrari
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Confederazione Nazionale Coltivatori Diretti
Roma - Via XXIV Maggio, 43
Confederazione Generale dell'Agricoltura
Roma - Corso Vittorio Emanuele, 101
CIA
Confederazione Italiana Agricoltori (ex Confcoltivatori)
Roma - Via Fortuny, 20
CGIL
Federbraccianti
Roma - Via L. Serra, 31
CISL
Unione Generale Coltivatori
Roma - Via Tevere, 20
Federpastori
Roma - Via XXIV Maggio, 43
FISBA-CISL
Federazione Italiana Salariati Braccianti e Maestranze Specializzate Agricole e Forestali
Roma - Via Tevere, 20
UIL
Unione Italiana Salariati e Braccianti Agricoli
Roma - Via Sallustio, 15
UIME
Unione Italiana Mezzadri e Coltivatori
Roma - Via XX Settembre, 118
ANCA LEGA
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Roma - Via Guattani, 13
CONFCOOPERATIVE
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Roma - Borgo S. Spirito, 78
Associazione Generale delle Cooperative Italiane
Roma - Viale Somalia, 164
UNCI
Unione Nazionale Cooperative Italiane
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Union Camere
Roma - Piazza Sallustio, 21
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Associazione Italiana Allevatori
Roma - Via Tomassetti, 9
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Associazione Industriale delle Carni
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Associazione Italiana dell'Industria Olearia
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CNO
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UNACE
Unione Nazionale Associazione Cerealicoltori e Semi Oleaginosi
Roma - Via Isonzo, 20
UNACOA
Unione Nazionale Associazioni Coltivatori Ortofrutticoli e Agrumari
Roma - Via Tevere, 20
UIAPROF
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Roma - Via Alessandria, 199
UIAPOA
Unione Italiana Associazioni Produttori Ortofrutticoli e Agrumari
Roma - Via Alessandria, 199
UNAPRO
Unione Nazionale Associazioni Produttori Ortofrutticoli
Roma - Salita Poggio Laurentina, 7
UNAPOA
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Roma - Viale delle Milizie, 16
UNATA
Unione Nazionale Associazioni Produttori di Tabacco
Roma - Via XXIV Maggio, 43
UNAFLOR
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UNARISO
Unione Nazionale Associazioni Produttori Riso
Roma - Via XXIV Maggio, 43

UNAPA
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UNAVINI
Unione Nazionale Associazioni Produttori Vitivinicoli
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UNAPROL
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UNAPOL
Unione Nazionale Associazioni Produttori Olivicoli
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AIPO
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UIAPROC
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UNAPOC
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UNALAT
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UNICAB
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Roma - Via Leone IV, 38
UNICEB
Unione Nazionale Importatori Carni e Bestiame
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UNACOMA
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UNIMA
Unione Nazionale Imprese di Meccanizzazione Agricola
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Useful addresses *pag. 103*

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N.B.

The map refers to
the European Union of 12 countries
since the data in this publication refer to 1994.
From 1st January 1995, Austria, Finland and Sweden
have become members of the European Union.

EMBER COUNTRIES EU
1 Belgium
2 Denmark
France
4 Germany
5 Greece
6 Ireland
7 Italy
8 Luxembourg
9 Netherlands
10 Portugal
11 United Kingdom
12 Spain
1
2
3
4
5
6
7
8
9
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11
12

INEA
36 Via Barberini
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Italy

MINISTERO
DELLE RISORSE
AGRICOLE
ALIMENTARI
E FORESTALI

Italian agriculture in figures

1996

630.945021 STX
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1996

ISTITUTO
NAZIONALE
DI ECONOMIA
AGRARIA

NORTH

1 Valle d'Aosta
2 Piemonte
3 Lombardia
4 Trentino Alto Adige
5 Veneto
6 Friuli Venezia Giulia
7 Liguria
8 Emilia Romagna

CENTRE

1 Toscana
2 Umbria
3 Marche
4 Lazio

SOUTH

1 Abruzzo
2 Molise
3 Campania
4 Puglia
5 Basilicata
6 Calabria
7 Sicilia
8 Sardegna

MINISTERO DELLE RISORSE AGRICOLE, ALIMENTARI E FORESTALI

Italian agriculture in figures 1996

N E A

Michele Pinto
Minister for Agricultural,
Food and Forestry Resources

This INEA booklet on the agro-food sector is now fully established and the publication of its eighth edition includes several new chapters. These additions bear witness, on the one hand, to the evolution of the sector in response to new needs from society: the environment and the healthiness and quality of food; and on the other, the role of state intervention in directing Italian agriculture towards these goals.

Besides the established economic data, more space has been given to the sections regarding the relationship between agriculture and the environment, organic farming and products of specific character; new information has also been included on structures regarding farm families and pluri-activity. In addition, a section dedicated to data on research and extension in agriculture has been introduced for the first time, prime factors in reaching important objectives such as international competitiveness, environmental protection, the safeguard of rural and disadvantaged areas and food quality. Finally, much space is dedicated to the application of structural policies in Italy and the accompanying measures of the European Union.

Heartfelt thanks must go, therefore, to INEA for having grasped the importance, in this small volume, of the need for concise but comprehensive information on the part of public institutions and all those who work in this sector.

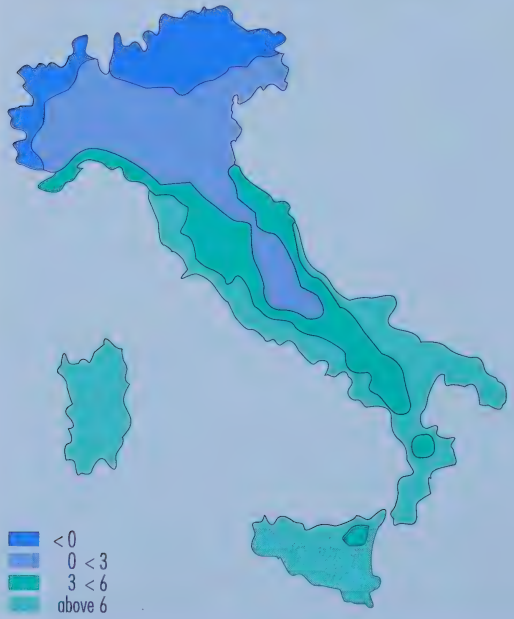
Unless otherwise indicated,
all statistical data contained in the text are derived
from ISTAT and INEA sources.
For international comparisons
EUROSTAT data has been used.

Data contained in this publication can be consulted on Internet,
address: http://www.inea.it/
It may be quoted provided the source is acknowledged.

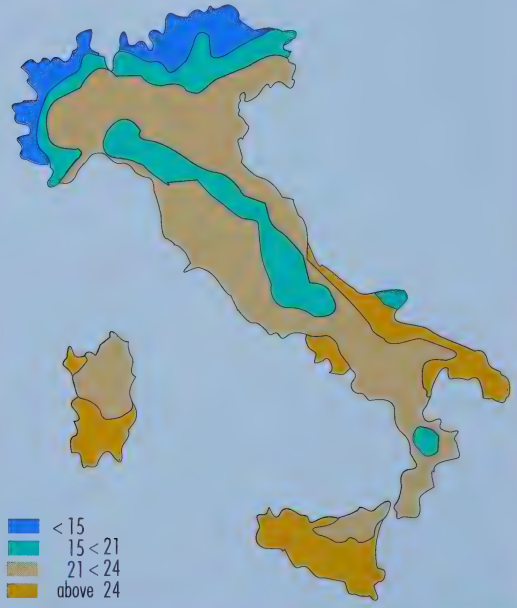
THE ECO-SYSTEM

Climate*

Average temperature of the coldest month (°C) (January)

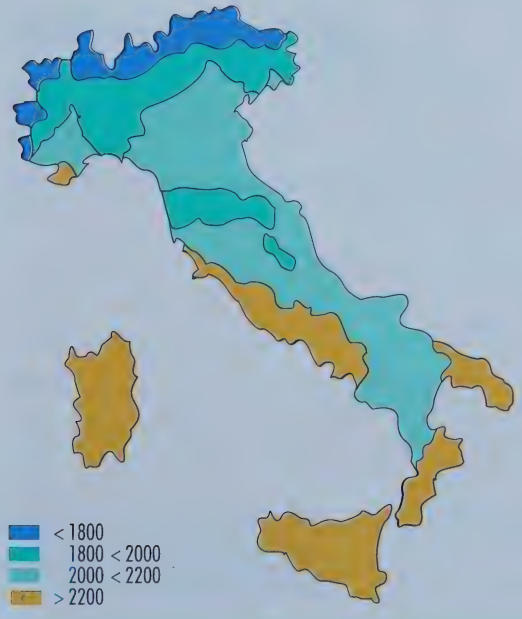


Average temperature of the warmest month (°C) (July)

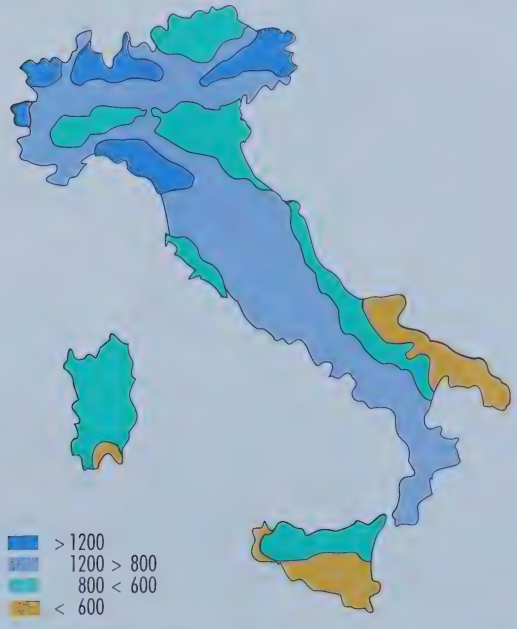


(*) Thirty year averages. Source: SIAN-UCEA Roma

Hours of sunshine per year



Total rainfall per year (mm)



Territory, Population and Economy

General characteristics

An important feature of the Italian national territory is the predominance of hilly and mountainous areas. Over a total area of about 30 million hectares, plains account for only 23%; this figure falls to 18% in the South and to 9% in the Centre. In recent years, demographic growth has been maintained almost completely by foreign immigration whilst the natural growth rate of the Italian population continues to be very low.

In 1995 there was an increase in the resident population of 0.8 per thousand as compared with 1994, an increase, however, which was not evenly spread throughout the country: the North was 0.1 per thousand, the Centre was 0.8 per thousand and the South was 1.6 per thousand.

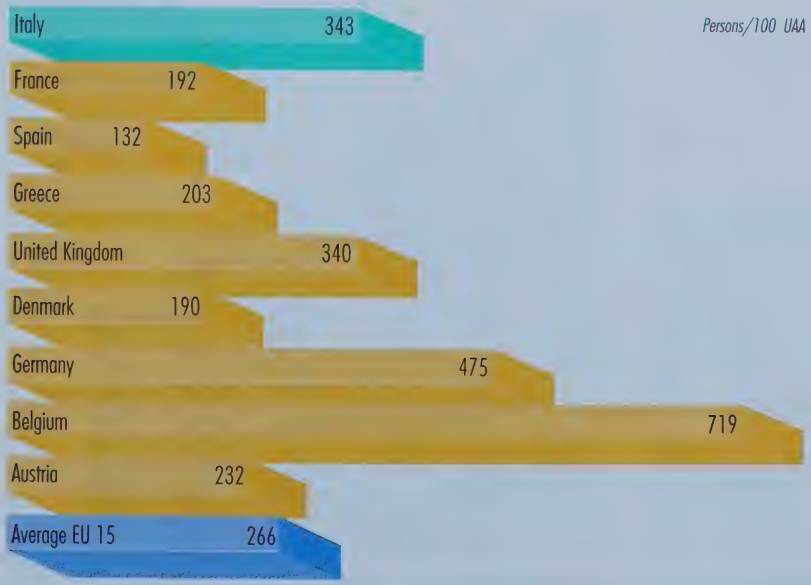
Territory and Population

Districts	Total area km²	SAU %	Popolation 000 units	Density no./km²	Work force 000 units
North	119,898	42.5	25,433	212	11,040
Centre	58,349	46.1	10,988	188	4,482
South	123,061	56.1	20,884	170	7,212
ITALY	301,308	48.8	57,305	190	22,734

Territory by altimetric zone (000 ha)

Zone	North	Centre	South	Italy
Mountains	5,532	1,576	3,503	10,611
Hills	2,271	3,723	6,548	12,542
Plains	4,189	534	2,255	6,978
TOTAL	11,990	5,835	12,306	30,131

Ratios of population to agricultural area (1995)



The agricultural area and the availability of land

The process of urbanisation is progressively absorbing land in Italy. Unproductive areas, mainly residential and for infrastructure, are increasing and are currently estimated at about 3 million hectares or 10% of national territory.

The agricultural area, on the other hand, is continuously decreasing: since 1970 the agricultural area utilised diminished by 2.8 million hectares (-16%) according to data from the most recent survey of farm structures.

This is a phenomenon which affects all European Union countries; however, in Italy there has been a more marked reduction. For example, between 1989/90 and

1993, according to the survey of farm structures by Eurostat, Italy showed a contraction in UAA of 1.4% as compared with an average fall of 0.6% for the 15 member states of the EU.

Land use in Italy and EU countries (% total area)

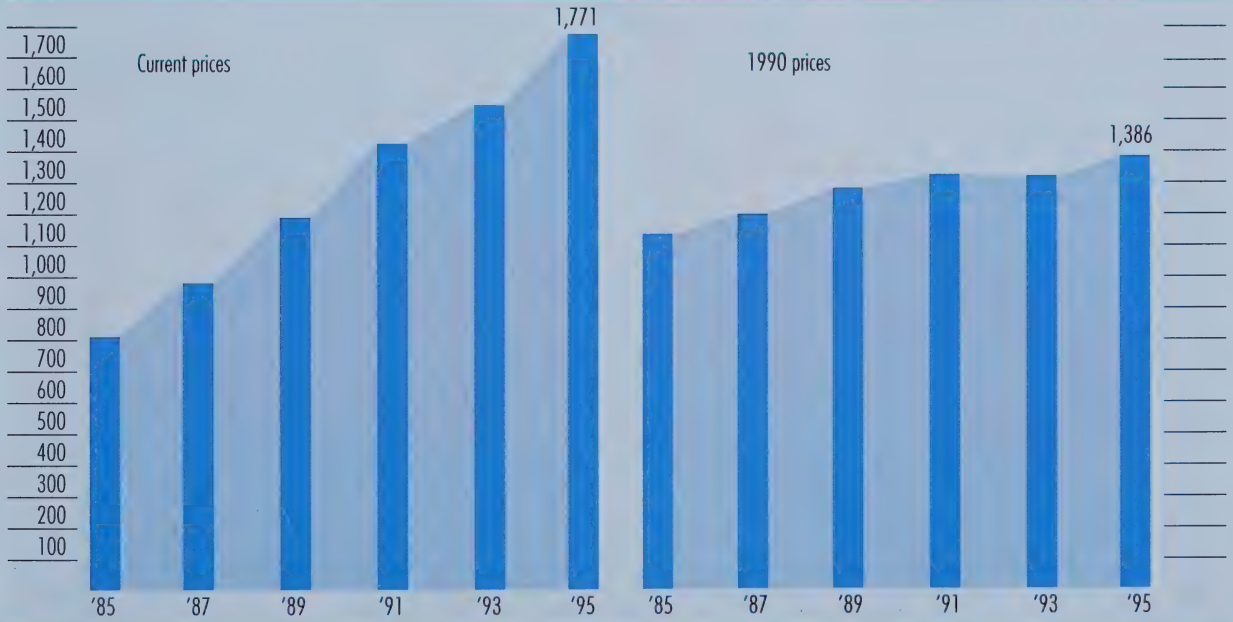
	Italy	(*) Other Mediterranean countries	(**) Other EU	(***) ex EFTA countries	Total EU-15
Arable land (1)	30.0	26.7	30.8	7.7	23.6
Permanent crops (2)	11.0	9.0	1.1	0.1	3.5
Vegetable gardens	0.3	-	0.3	-	0.1
Permanent meadows and pastures	14.3	17.7	24.1	2.7	16.0
Woodland	22.5	30.1	22.1	55.9	33.0
Inland waterways	2.4	1.3	1.7	8.4	3.5
Unproductive areas and other land (3)	19.6	15.2	19.9	25.2	20.3
TOTAL AREA (000 ha)	30,131	72,866	133,814	87,197	324,008

(*) Greece, Spain, Portugal. (**) France, Germany including ex GDR, Benelux, Denmark, Ireland, Great Britain. (***) Austria, Finland, Sweden.

(1) Including temporary forage crops and set aside.
(2) Tree and other permanent crops.
(3) Civic and industrial settlement, infrastructure, rocks and barren land: abandoned and uncultivated land, ornamental parks and gardens, farm land under buildings and road are included under other headings.

Gross Domestic Product

Gross domestic product 1985-1995 (billion lire)



GDP per capita and per work unit 1985-1995 (million lire)

Agriculture and the Environment

Consideration of the relationship between agriculture and the environment involves, above all, a discussion of the evolution of the environmental policy of the EU. The latter has undergone a particularly rapid development in recent years, beginning with the addition of the Environmental Protocol to the Single European Act of 1986 which confirms the need for common action for conservation of the environment.

The three preceding Programmes for Environmental Action (1973-76, 1977-81, 1982-86) already contained some guidelines for an environmental policy within the EU which still remain valid, but it is, however, the Single Act which lays the juridical basis for intervention in the environment, supplying a framework of reference for the various types of unilateral action.

An important element in the new treaty is the obligation to consider protection of the environment as an essential component of all other EU policies in an integrated approach which has become even more evident in the Fourth (1987-92) and Fifth (adopted in 1993) Programmes for Environmental Action.

With specific reference to the agricultural sector, and in spite of various Community provisions specific to the environment in the 1970s and 1980s, the EEC Regulation 797/85 is the first legislative measure which links agricultural policy to the safeguard of the environment. The primary objective here, however, is the limitation of surplus agricultural production.

A whole series of measures stem from this which are linked with wider objectives of agricultural policy but which favour environmental protection through incentives for low-impact methods of agricultural production, for reconversion, extensive farming and set-aside. Amongst them are to be found structural and territorial provisions such as Regulations 2052/88, 4253/88 and 2328/91.

Regulation 2092/91, later modified by Reg. 2083/92, on the other hand, has a direct influence on agriculture, dealing with organic farming. Although no financial measures are foreseen, the role of organic farming in safeguarding and preserving the rural environment is recognised with the definition of a normative framework for production and marketing of organic products.

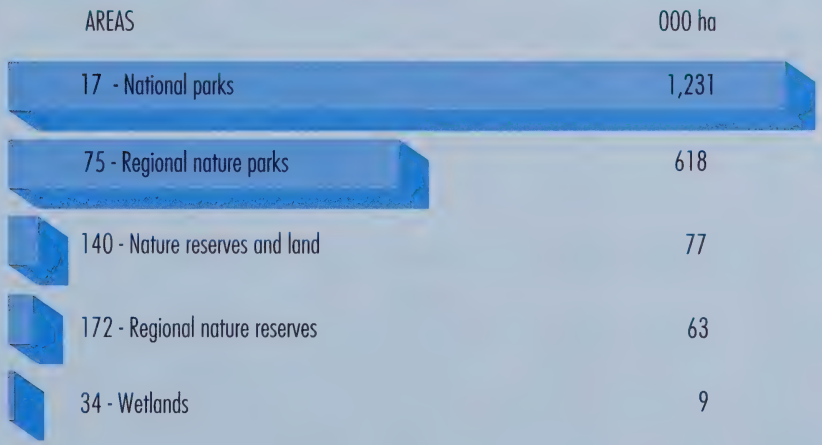
In the context of recent measures accompanying the reform of the Common Agricultural Policy, Regulation 2078/92 opens the way to direct aid for farmers and serves

to introduce or maintain methods of agricultural production compatible with the needs of environmental protection and nature conservation. The Regulation has been implemented over the whole country on the basis of multi-year Regional programmes.

Amongst other initiatives of the European Union which directly or indirectly affect the primary sector, particular mention must be made of:

- *Reg. 2080/92 which initiates a Community regime of aid to forestry in the agricultural sector. The premia and incentives to forestry plantings have the dual objectives of protecting the environment and of putting a brake on agricultural production;*
- *Reg. 1973/92 which introduces a financial measure in favour of the environment (LIFE). An allocation of 400 million ECU is foreseen for the period 1991-95 for all actions contributing to the development and application of Community policy and legislation for the environment following the principles of polluter pays and of subsidiarity;*
- *Directive 43/92 concerning the preservation of natural and semi-natural habitats of wild flora and fauna. The main objective of the Directive is that of preserving bio-diversity through maintenance or restoration of habitats and of species of animals or plants. For this purpose special areas of conservation are to be identified which will constitute a European ecological network (Natura 2000);*
- *the programme of initiatives such as LEADER II, emanated in 1994 and adopted by the Regions with their own programmes, promotes initiatives for rural development. Great emphasis is laid on agriculture with low environmental impact, on crops for energy production, on measures for protecting the environment and on rural tourism.*
- *at national level, besides the norms relating to Community regulations, mention must be made of the framework Law 394/91 for protected areas promoted by the Ministry for the Environment, which also regulates agricultural activities in protected areas, and the deliberation on 18/12/95 of the Second Three-year Programme which finances the implementation of the framework law for the period 1994-96 with funding amounting to 154.6 billion lire.*

Protected areas



TOTAL AREAS PROTECTED	438
TOTAL 000 ha PROTECTED	1,998
TOTAL NATIONAL 000 ha	30,131

Protected areas

Five national parks were set up in Italy some time ago. They are:

- *Gran Paradiso 70,000 ha*
- *Stelvio 134,620 ha*
- *Abruzzo 43,900 ha*
- *Circeo 8,400 ha*
- *Calabria 12,689 ha*

The establishment of the following national parks was deliberated under the Financial Law for 1988 (no. 67) and under Law 305 of 29/08/1989 (Three-year Plan for the protection of the environment):

- *Dolomiti Bellunesi 31,512 ha*
- *Monti Sibillini 71,437 ha*
- *Pollino 192,565 ha*
- *Parco Nazionale dell'Aspromonte 78,517 ha*
- *Foreste Casentinesi del Monte Falterona e Campigna 38,118 ha*

- *Archipelago Toscano 3,419 ha on land and 65 ha of sea.*

The following national parks have been established by the law no. 394/91 on protected areas:

- *Gran Sasso e Monti della Laga 153,654 ha*
- *Gargano 129,257 ha*
- *Vesuvio 8,482 ha*
- *Maiella 78,113 ha*
- *Cilento e Vallo di Diano 225,730 ha*
- *Val Grande 12,210 ha.*

State-protected areas by Region, 1994 (ha)

Regions	Areas	% reg. area	Composition %	ha/100 inhabitants
Piemonte	175,654	6.9	6.2	4.2
Valle d'Aosta	41,697	12.8	1.5	35.6
Lombardia	505,224	21.2	17.7	5.7
Bolzano	168,658	22.8	5.9	38.0
Trentino	103,115	16.6	3.6	22.8
Veneto	77,777	4.2	2.7	1.8
Friuli V.G.	45,398	5.8	1.6	3.8
Liguria	62,279	11.5	2.2	3.7
Emilia Romagna	123,731	5.6	4.3	3.2
Toscana	128,988	5.6	4.5	3.7
Umbria	17,424	2.1	0.6	2.1
Marche	74,871	7.7	2.6	5.2
Lazio	124,360	7.2	4.4	2.4
Abruzzo	338,794	31.4	11.9	27.0
Molise	5,606	1.3	0.2	1.7
Campania	236,772	17.4	8.3	4.2
Puglia	122,029	6.3	4.3	3.0
Basilicata	93,346	9.3	3.3	15.3
Calabria	194,971	12.9	6.8	9.4
Sicilia	200,243	7.8	7.0	4.0
Sardegna	14,328	0.6	0.5	0.9
ITALY	2,855,265	9.5	100.0	5.0

The Use of Chemicals

In recent decades there have been considerable increases in agricultural productivity, made possible, amongst other things, by greater use of chemicals. This, in many cases, has undoubtedly undermined the positive contribution of agriculture to environmental protection.

More recently, however, there has been a slightly downward trend in the use of chemicals due both to the new orientation of the CAP and to the adoption of programmes for integrated measures for plant protection in many Regions.

As regards the per hectare use of fertilisers, total average use fell in 1994 from 158 to 139 kg, but the overall trend has tended to fluctuate in recent years. Use of pesticides, on the other hand, has seen a steadier downward trend, and in 1994 average overall use fell from 12.3 kg to 11.1 kg.

Chemical distributed for use in agriculture (Kg per ha of eligible area) (1)

	Fertilisers			Pesticides		
	Nitrogen	Phosphorous pentoxide	Potassium oxide	Fungicides	Insecticides	Weedkillers
1988	77.3	58.8	38.7	9.2	2.9	2.4
1989	73.0	54.2	34.6	8.1	2.7	2.2
1990	59.9	47.7	28.1	8.4	2.7	2.1
1991	64.4	46.7	28.8	7.1	2.6	2.0
1992	70.0	48.3	30.9	7.5	2.6	1.8
1993	75.6	51.2	31.3	7.6	2.7	2.0
1994	66.6	46.3	26.5	6.6	2.5	2.0

(1) Eligible area is the sum of areas of arable land (minus set-aside), tree crops, (excluding canes), forage crops (excluding pasture) and vegetables.

The use of fertilisers and chemicals (billion lire)

The Use of fertilisers and chemicals in Italy in 1994 (retail sales)

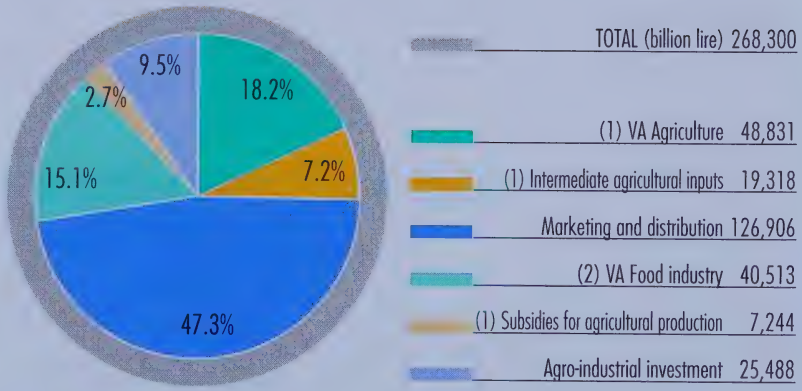
Regions	Nitrogen	Nitrogen phosphate	Potassium oxide	Chemicals	
		000 ql.		000 Kg	Change % 1994/89
Valle d'Aosta	0.2	0.3	0.5	82	-45.3
Piemonte	767	415	562	15,738	-5.9
Lombardia	1,103	588	639	11,653	-18.1
Trentino A,A,	50	41	38	5,579	-1.8
Veneto	767	631	608	18,611	-24.0
Friuli V,G,	283	129	125	4,161	8.1
Liguria	39	60	12	2,007	-32.5
Emilia R,	1,276	819	383	26,000	-17.5
Toscana	527	371	186	6,323	-16.2
Umbria	227	187	43	2,848	-17.8
Marche	317	316	46	4,397	-20.4
Lazio	400	295	88	7,588	-45.6
Abruzzi	189	179	69	4,047	-18.4
Molise	94	74	9	839	-2.3
Campania	439	235	82	10,819	-29.6
Puglia	908	571	143	15,411	-5.0
Basilicata	113	80	15	2,085	-15.4
Calabria	248	187	77	3,541	-12.7
Sicilia	551	494	195	13,138	-22.3
Sardegna	129	182	31	3,082	-30.0
ITALY	8,427	5,854	3,352	157,980	-19.1

THE AGRO-INDUSTRIAL SYSTEM

Components

The agro-industrial system constitutes a set of activities where agriculture interacts with all those sectors which are linked to it: the production of inputs (fertilisers, pesticides, feed compounds, energy, etc.); the food and catering industries.
Estimates set the value of the agro-industrial complex in 1995 at 268,300 billion lire, over 15% of GDP. The main components are: 49,000 billion for value added in agriculture, 19,000 for intermediate inputs, 25,000 for agro-industrial investment, 40,000 for value added in the food industry and 127,000 for the trading and distributive sector.
Services supplied by the public sector are not included in the estimates, even though they make an important contribution to the system.

Main components



(1) Including fishing.
(2) At market prices.

FACTORS OF PRODUCTION

Intermediate inputs
Credit for agriculture
Investment
Employment

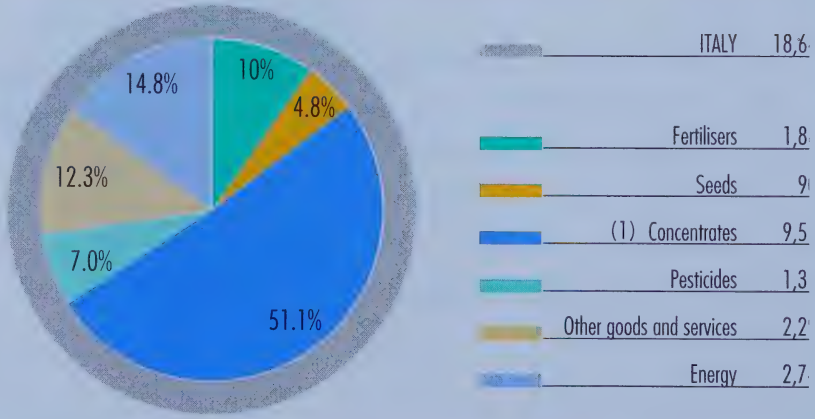
Intermediate Inputs

Expenditure for intermediate inputs in 1995 amounted to over 18,600 billion lire, an increase in value of over 1.8% as compared with the previous year. For the third consecutive year there was a reduction in quantities used (-0.8%), even if the drop was smaller than in the previous two years (-2.2% in 1994; -3% in 1993). In particular, there were reductions in the use of feed concentrates (-1.3%), fertilisers (-0.8%) and energy (-1.2%).

Price increases were marked, reaching an annual average of 9% as compared with the 1.4% of the previous year. Energy prices in particular rose by 12.7%, a reaction to increased excise duties on diesel for agriculture. There were also significant increases in the prices of fertilisers (13.3%) and feed concentrates (8.6%) linked to the rise in the cost of raw materials during the year.

The percentage incidence of expenditure for intermediate inputs on VFO in agriculture increased in 1995 to 28.4% as compared with 28.1% in 1994.

Main categories of intermediate inputs (billion lire)



(1) Including other expenses for livestock.

Credit for Agriculture

The legislative decree no. 385/93 regarding the single text of laws for banking and credit modified the definition of specific operations in credit in the sector. In particular, the statistical information transmitted to the Bank of Italy in January 1995 from ex-Credit enterprises and ex-Institutes of special credit was pooled together and the current definition, therefore, no longer precisely matches the one used previously. Current data include total credit (subsidised and not), including credit for fishing, and are divided into "short term" and "medium and long term", a division which only partially coincides with the previous one of "working capital" and "farm improvement" credit.

Figures for 1995 show a considerable recovery in short-term credit (45%), which brings it back into line with 1993 levels. Moreover, the importance of this section as a percentage of total credit rose from 28.3% to 34.9%, after a steady drop in the last five years, due, amongst other things, to a slight but sustained increase in medium and long-term credit. The relationship between total credit and VFO for agriculture also increased from 1994 (29.3%) to 1995 (32.6%), notwithstanding a climate of fluctuating trends.

Credit for agriculture - at year end (billion lire)

Years	Short term	Medium and long term	Total	% VFO
1990	7,526	11,092	18,618	31.9
1991	7,845	11,484	19,329	29.9
1992	7,354	13,406	20,760	32.4
1993	5,986	13,814	19,800	31.3
1994	5,382	13,596	18,978	29.3
1995	7,838	14,640	22,478	32.6

Source: Bank of Italy.

Investment

In 1995 investment in agriculture increased by about 3.8% in real terms, confirming the recovery seen in the previous year. At constant prices the relationship between fixed investment and value added in agriculture amounted to 29.4%, a higher level than that recorded in the previous three years. The increase in investment matched an increase in accumulation: the net stock of capital showed an increase in real terms of 0.4% as compared with 1994.

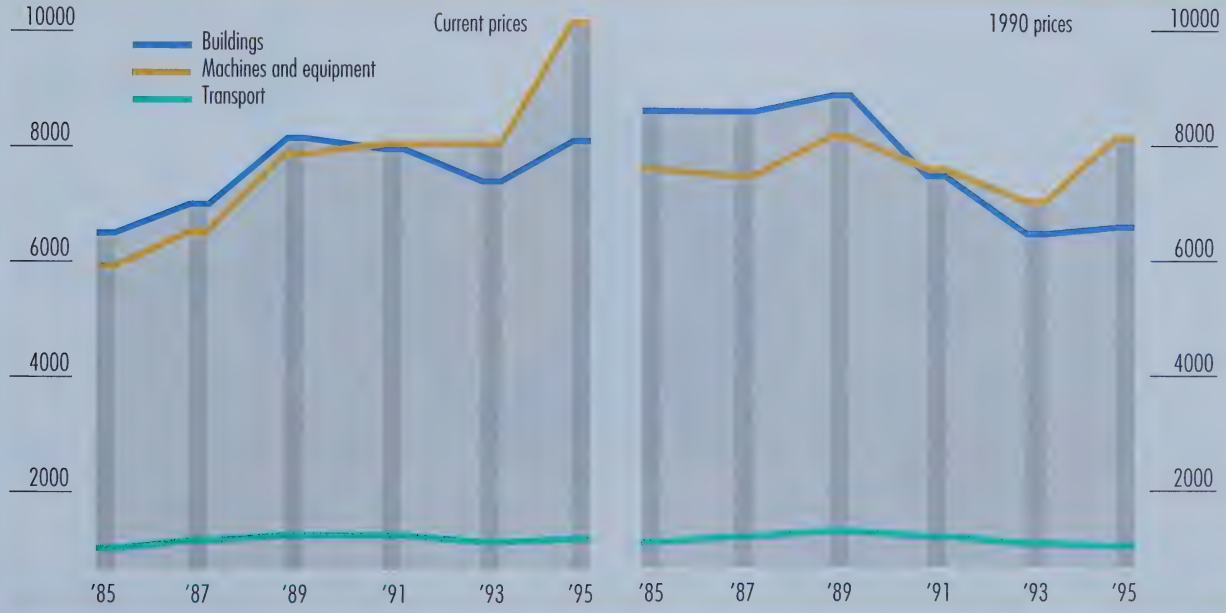
The greatest development in investment goods was found in the machinery and equipment sectors where there was an increase of 7% at constant prices.

Trends in agricultural investment (*)

	Value current prices billion lire	Value 1990 prices billion lire	% of total gross fixed investment (1)	% ratio agricult. investment to agricultural VA (1)
1985	12,234	16,466	7.6	34.6
1986	13,103	16,694	7.6	34.7
1987	13,611	16,444	7.1	33.0
1988	16,117	18,405	7.5	38.5
1989	16,397	17,584	6.8	36.4
1990	16,180	16,180	6.1	35.0
1991	16,456	15,331	5.7	30.3
1992	16,238	14,471	5.5	28.3
1993	15,672	13,402	5.8	26.6
1994	17,260	14,326	6.2	28.4
1995	18,790	14,870	6.1	29.4

(*) Including forestry and fishing.
(1) At 1990 prices.

Machines, buildings and other forms of investment (billion lire)



(*) Estimates from Unioncamere and "Relazione sulla situazione economica del paese".

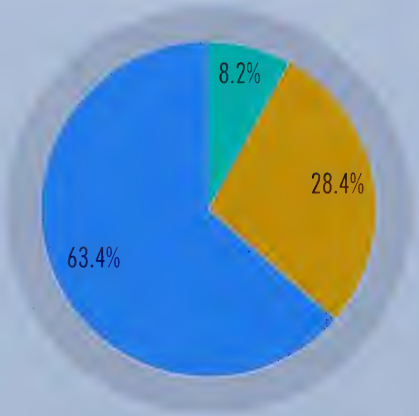
Employment

In 1995 the total figure for employment expressed in work units showed a further fall (-0.4%), even if smaller that that of 1994 (-1.5%). Demand for labour fell both in agriculture (-3.4%) and industry (-1.3%) while it rose slightly in the tertiary sector (0.9%).

In agriculture there was a fall both in the number of employed workers (-3.8%) and in that of self-employed workers (-3.3%).

The former category recorded a drop in numbers of 23,000 units, in absolute terms, falling from 4% to 3.9% of the total units of employed workers. The latter category recorded a drop of 42,000 units, falling from 18.5% to 17.8% of the total units of self-employed workers.

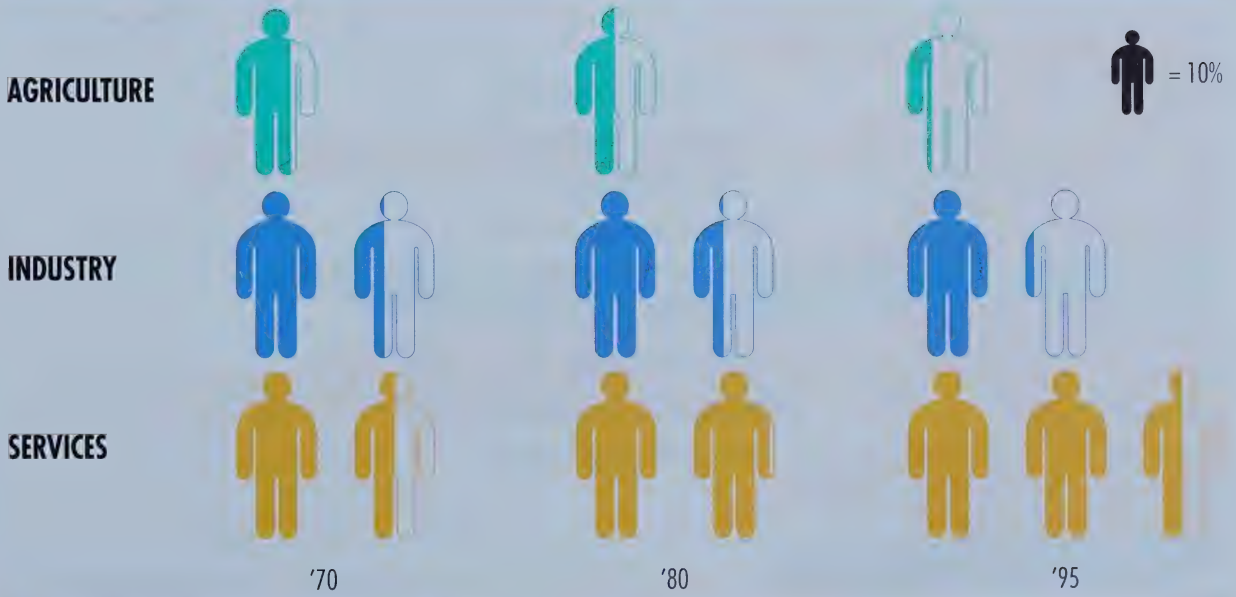
WU per sector (000 units)



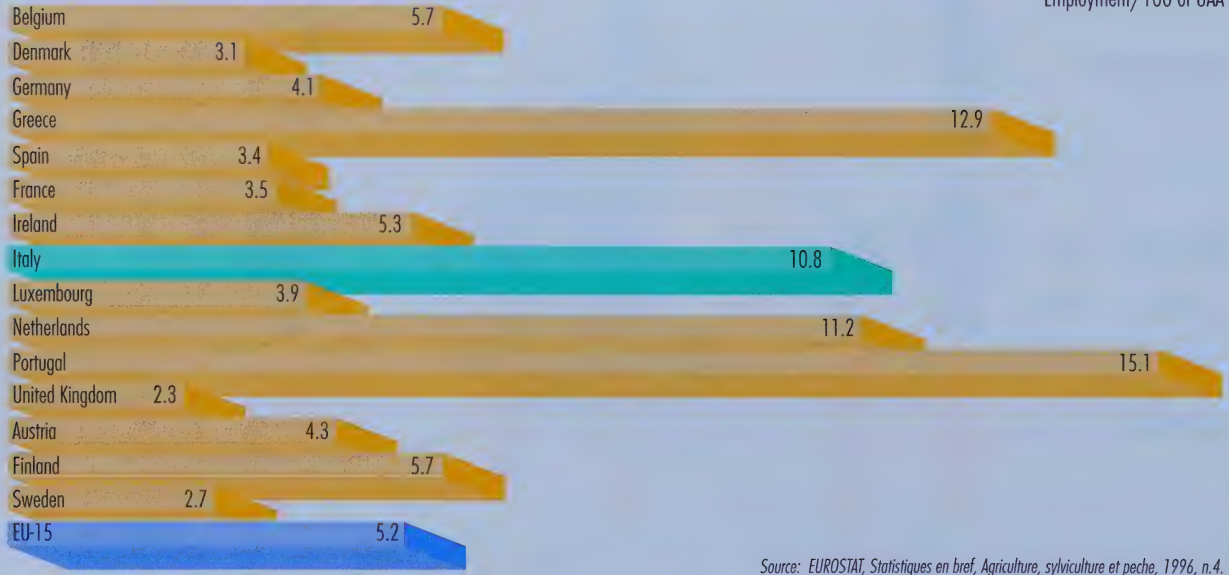
TOTAL	22,165
Agriculture	1,827
Industry	6,288
(1) Services	14,050

(1) Including public administration and similar.

WU/population (%)



Employment in agriculture in the EU



Source: EUROSTAT, Statistiques en bref, Agriculture, sylviculture et peche, 1996, n.4.

THE AGRICULTURAL SECTOR

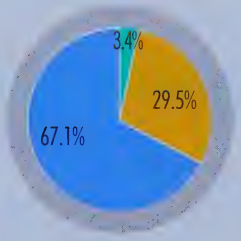
Value added
Productivity
Production
Prices and costs
VFO and agricultural incomes
The food industry
Retail distribution
Food consumption
Foreign trade

Value Added

In 1995 VA at factor cost in the primary sector increased by 5.9% at current prices as compared with 1994; in contrast, quantities remained almost stationary. The contribution of agriculture to value added for the Italian economy was 3.4%, slightly lower than that of 1994. At constant prices the share of agricultural value added in the national total has fallen from 8.1% in 1970 to 6.2% in 1980 and to 3.8% in 1995. Over the same period the share of industry has shown signs of decline while that of services has increased considerably, reaching about 65% of total value added.

The share of agriculture in Italy is still greater that that in other industrialised countries, especially in terms of employment. Despite trends in these variables in recent years bringing the Italian position closer to that of other countries of the centre and north of Europe, sharp regional contrasts still persist between the North and South of Italy.

VA per sector (billion lire)



TOTAL	1,672,646
Agriculture, forestry, fishing	57,116
Industry	493,955
Services, including public administration	1,121,575

The share of agriculture in the economy as a whole (*)

Countries	Value added %	Employment %
Italy	2.6	7.9
France	2.0	4.8
Spain	2.7	9.8
Greece	7.5	20.8
Germany	0.8	3.0
Netherlands	3.2	4.0
United Kingdom	0.9	2.2
Austria (1)	2.2	13.3
Finland	1.8	8.3
Sweden	1.0	3.4
EU 15	1.8	4.0
USA (2)	1.7	1.7
Japan (2)	1.6	6.4

(1) For employment, the year of reference is 1993.
(2) 1992; for USA employment, 1993.

Productivity

VA/WU by sector at 1990 prices (billion lire)

Value added per work unit at factor cost and at constant prices in the agricultural sector amounted to 40.5% of that in industry and 37.6% of that in marketable services (commerce, transport, credit, tourism, and other services); ten years previously it was 38% of VA in industry and 31% of that in services.

(1) Excluding public administration and similar.

Production

In the agricultural sector 1995 was characterised by a standstill in production levels, as in 1994. The VFO fell by -0.1% in volume and rose by over 7% in value because of marked price increases.
Climatic conditions were not favourable: the North-western Regions experienced spring frosts, and in Emilia Romagna there were disastrous hail storms in June. The summer followed with widespread heavy rain, but particularly affecting Puglia and Basilicata. The worst hit areas were fresh fruit and vegetable production. The trend in the sector reflected the climatic problems along with farmers' decisions regarding production. As a result, productive results in individual sectors varied considerably: field crops showed a slight drop (-0.4%), after the previous year's increase, while tree crops recorded a fall for the third consecutive year (-1.7%); in contrast, livestock production increased (1.3%). Cereals production increased in real terms by 1.9%, a result affected on the one hand by the expansion in maize crops (13%) and, on the other, the decline in production of hard wheat (-6.4%).

VFO by sub-sector

Sub-sector	North		Centre		South		Italy	
	billion lire	%	billion lire	%	billion lire	%	billion lire	%
Field crops (1)	9,876	29.8	3,839	42.0	9,391	38.5	23,106	34.7
Tree crops	5,379	16.3	2,274	24.9	9,714	39.8	17,367	26.1
Livestock	17,321	52.4	2,812	30.7	5,110	20.9	25,243	37.9
Forestry	510	1.5	223	2.4	203	0.8	936	1.4
TOTAL	33,086	100.0	9,148	100.0	24,418	100.0	66,652	100.0

(1) Including forage.

Agricultural production in countries of the EU in 1994 (*)

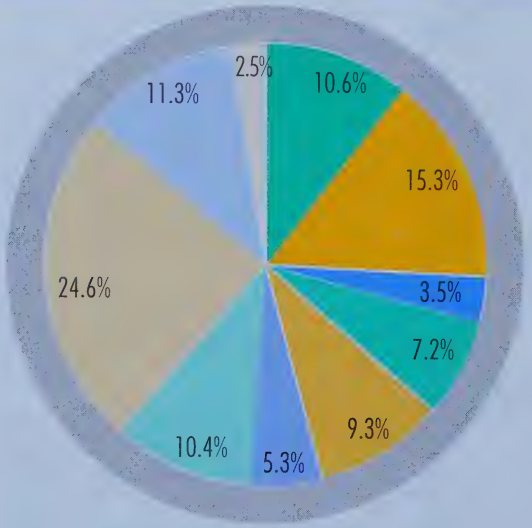
Crop	Harvest		Marketable output	
	000 t.	% change	billion lire	% change
soft wheat	3,853	-1.1	1,305	11.5
hard wheat	4,143	-4.9	1,473	13.1
maize	8,447	12.9	2,437	34.3
rice	1,328	-2.4	1,032	9.7
sugar-beet	13,750	8.9	1,154	5.3
tobacco	119	-5.7	603	7.5
soya	737	2.4	293	10.2
sunflowers	527	-3.2	195	-8.9
potatoes (new and ordinary)	2,061	2.0	1,120	17.3
tomatoes	5,197	-6.8	1,278	-4.4
grapes (dessert and ordinary)	8,455	-9.3	-	-
wine (000 hl)	56,410	-4.8	5,575	11.9
olives (for oil and for table)	3,095	17.2	-	-
oil (ooo ql pressed.)	5,862	20.5	3,253	36.3
apples	1,944	-13.0	1,251	-11.4
pears	868	-6.0	655	2.4
peaches and nectarines	1,700	-5.4	1,287	8.2
oranges	1,975	9.2	1,104	18.7
lemons	671	21.9	592	23.3
mandarines and clementines	515	12.0	371	23.8
kiwi	324	-6.0	421	3.7

Oilseeds increased on average by 5%, above all reflecting the jump in colza production (218%). Sugarbeet production rose (9%), even if the result was mitigated by a considerable drop in the degree of polarisation. Vegetable production fell on average by 3% with a more marked decline particularly in tomatoes (-6.8%) and fresh beans (-8.1%). Potato production was also down (-8%) There was, however, a more optimistic picture in the flower and ornamental plant sector (+3%) particularly with regard to marketing.

In the tree crops sector, fruit production fell by 8.6%; the drop in apples was considerable (-13%), as for nectarines (-13%) and apricots (-41%). Dessert grapes recorded a steep drop (-34%) accompanied by a significant fall

(*) Provisional data.

VFO in agriculture by main sectors (billion lire)



TOTAL	65,713
(1) Cereal, forage and dried pulses	6,963
(2) Horticultural	10,073
(3) Industrial crops	2,295
Flowers and ornamental plants	4,768
Grapes	6,092
Olives	3,453
Fruit including citrus	6,827
Meat	16,199
Milk	7,422
Eggs and other	1,621

(1) Forage crops were 156 billion lire, dried pulses, 99 billion lire.
(2) Including potatoes and fresh pulses.
(3) Sugar beet, tobacco, oilseeds, textile fibres and other industrial products.

in wine production (-4.8%). Olive production was up considerably, thanks to the high-yield year of the two-year production cycle, at 17%. It is worth noting the recovery in citrus fruit production after the fall in 1994, and especially mandarines (28%) and lemons (22%).

In the livestock sector, there were increases in all the main areas of production, and especially in beef

Main livestock products and changes since 1994

Types of livestock and product	Number		Output (5)		Marketable output	
	000 head	% change	000 t.	% change	billion lire	% change
Cattle (1)	7,128	-2.0	1,578	3.2	6,770	8.8
Pigs	7,964	-0.7	1,591	-0.4	4,209	5.8
Sheep and goats	11,988	-1.2	97	2.2	421	-1.6
Poultry(2)	182,400	2.1	1,367	0.3	3,334	-4.3
Rabbits			376	2.6	1,378	3.7
Eggs (3)			12,072	1.3	1,568	1.5
Cows milk (4)			9,749	1.1	6,590	5.3
Sheep and goat milk (4)			666	1.5	832	10.2

(1) Including buffaloes amounting to 110,000 head.
(2) Of which 105 million hens, 57.7 million laying hens, 12.6 million turkeys, 5.4 million guinea fowl, 1.7 million ducks and geese. Source: UNA
(3) Production in millions.
(4) Production in 000 hl; buffalo milk included with cows milk.
(5) Liveweight for meat.

Agricultural production in countries of the EU in 1994

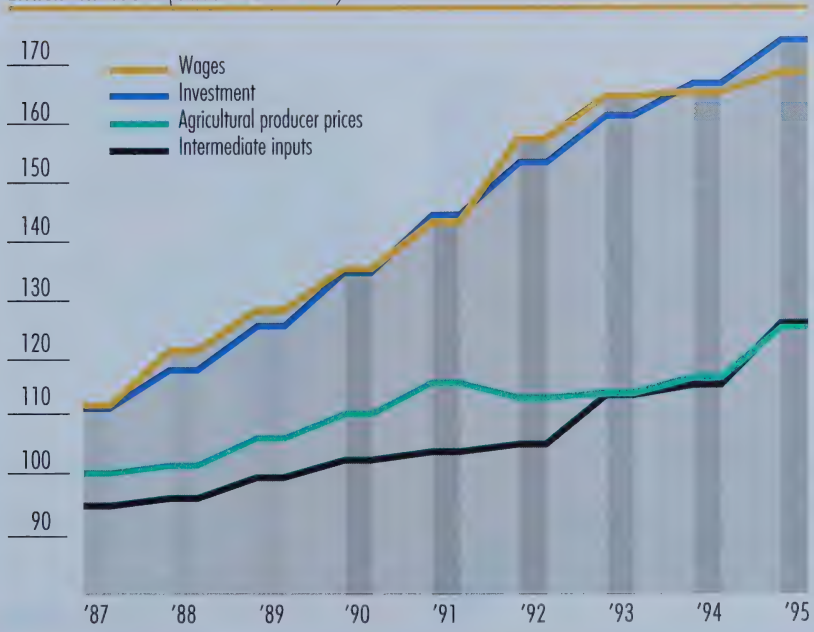
Country	Final output (*) million ECU	%	Intermediate inputs (*) million ECU	%	Intermediate inputs/ final output %
Italy	32,332	15.7	9,104	9.6	28.2
Belgium	6,864	3.3	3,893	4.1	56.7
Denmark	6,337	3.1	3,303	3.5	52.1
Germany	31,470	15.3	17,395	18.3	55.3
Greece	8,722	4.2	2,286	2.4	26.2
Spain	22,727	11.0	10,334	10.9	45.5
France	43,916	21.3	21,321	22.4	48.5
Ireland	4,307	2.1	1,968	2.1	45.7
Luxemburg	185	0.1	81	0.1	43.8
Netherlands	16,807	8.1	7,871	8.3	46.8
Portugal	3,352	1.6	1,771	1.9	52.8
United Kingdom	17,949	8.7	9,977	10.5	55.6
Austria	4,793	2.3	1,863	2.0	38.9
Finland	3,269	1.6	1,715	1.8	52.5
Sweden	3,300	1.6	2,119	2.2	64.2
EU 15	206,330	100.0	95,001	100.0	46.0

(*) 1 ECU = 1915 Lire.

(3.2%) and sheep and goats (2.2%), and, to a lesser extent, cows' milk (1.1%).
Finally, forestry showed a slight increase in the quantity of timber produced (1.1%).

Prices and Costs

Index numbers (base 1985 =100)

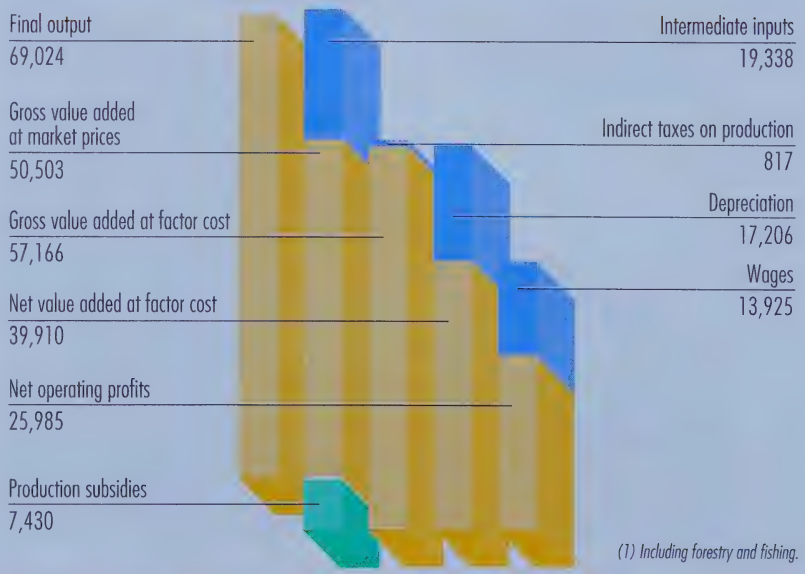


Prices of intermediate inputs showed a marked increase in 1995 (9.1%). Prices rose for feed concentrates (13.3%), and for fuel and electricity (12.7%) and there was also an increase in the price of investment goods (5%). Labour costs, however, showed only a slight increase. After years characterised by increases below the level of inflation, producer prices saw a reversal in trends, with an increase of 7.5% as compared with the previous year. The market reflected the trend of international prices, especially for cereals, and the product shortage caused by seasonal factors and the rotation of crops. In general there was a recovery both in field crops (+8.1%) and tree crops (+13.2%). Price increases in the livestock sector, on the other hand, were modest.

VFO and Agricultural Incomes

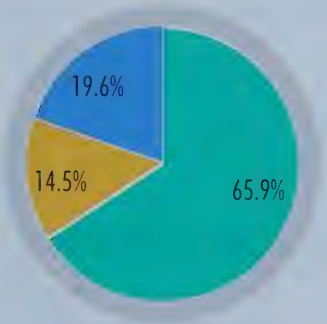
In 1995 the value of final marketable output, including production subsidies, was constituted as follows: 25.3% intermediate inputs (seeds, fertilisers, feed concentrates, energy, etc.) and 18.2% wages. Self-employed labour (farm entrepreneurs, and family workers) together with capital and enterprise received 34%, while 22.5% went towards amortisation.
Subsidies from the European Union and from the Italian State amounted to 9.7%, a reduction as compared with the previous year.

The structure of agricultural income (1) (billion lire)



(1) Including forestry and fishing.

VA at factor cost



	Value added		% Value added in agriculture	
TOTAL ITALY (billion lire)	29,827		ITALY	52.2
North %	65.9		North	87.8
Centre %	14.5		Centre	59.8
South %	19.6		South	26.7

The food industry accounted for about 8% of total value added at factor cost for the manufacturing sector as a whole. Its relative weight has declined since 1994, due above all to the rather modest performance of production. Downward trends prevailed in the meat processing sector (-6.3%), the molinary sector (-2.2%) and the drinks sector (wine: -5.2%; soft drinks and mineral water: -4.3%). Positive trends emerged, on the other hand, in the confectionery industry (12.5%), the oils sector (oils and fats 7.5%), the dairy industry (3.2%) and the pasta sector (4.5%).

Value added in the food industry fell in real terms by 1.2%, in contrast with the recovery demonstrated by the industrial sector as a whole (3.8%). Exports recorded 13% of total food industry turnover showing a dynamic performance, with an

increase in value of over 20% as compared with 1994.

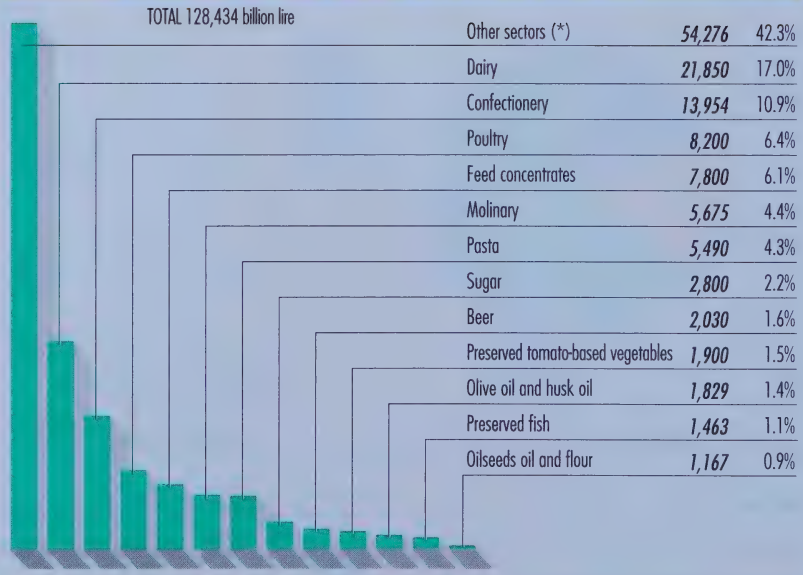
The food industry in Italy is in continuous evolution and attracts considerable amounts of investment both from national and from foreign sources: concentration is increasing although productive capacity is still dominated by the presence of small and medium enterprises. (about 32,000 enterprises, with around 370,000 employees).

Strong differences remain in geographical, structural and technological development, particularly between the South and the Centre-North.

Manufacturing activities are mainly concentrated in the North where, in the last ten years the rate of increase of value added has been constantly higher than that of the South.

In the European Union the agro-

Turnover in the food industry, 1995


TOTAL 128,434 billion lire
Other sectors (*) 54,276 42.3%
Dairy 21,850 17.0%
Confectionery 13,954 10.9%
Poultry 8,200 6.4%
Feed concentrates 7,800 6.1%
Molinary 5,675 4.4%
Pasta 5,490 4.3%
Sugar 2,800 2.2%
Beer 2,030 1.6%
Preserved tomato-based vegetables 1,900 1.5%
Olive oil and husk oil 1,829 1.4%
Preserved fish 1,463 1.1%
Oilseeds oil and flour 1,167 0.9%

(*) Includes the sector "pres. pork and beef" which, with a turnover of 10,400 billion lire represents about 19% of "other sectors".
Source: Estimates on Confindustria data.

The food industry in the EU (1994) (*)

Country	% turnover	% employment
Italy	11.8	8.8
France	19.2	15.6
Germany F.R.	23.4	20.2
Benelux	11.0	8.2
Denmark	3.3	2.8
United Kingdom	16.6	22.0
Spain	9.1	15.0
Other (1)	5.5	7.4
EU 12	(2) 516.858	(3) 2.356

(*) Including drinks and tobacco.
(1) Ireland, Greece, Portugal.
(2) Million ECU; exchange rate (1994) 1 ECU =1915 Lire approx.
(3) 000 Work units.

food sector represents one of the main sectors as regards employment and value added.
About 88% of production in the EU (12) is concentrated in Germany, France, the United Kingdom, Italy, Spain and Holland.

In recent years, there has, however, been marked growth in production in Denmark, Ireland and Greece.
The new member states, Sweden, Finland and Austria have recorded variable trends in recent years.

Production in Italy: changes

Sectors	1995/94
Milling (1)	↓
Pasta	↑
Biscuits and bread	↑
Processing fruit and vegetables	↑
Oils and fats	↑↑
Butchery and meat processing	↓↓
Dairy production	↑
Sugar refining	↑↑
Confectionery	↑↑
Frozen food	↑↑
Infant and dietary	↓↓
Wine	↓
Mineral water and soft drinks	↓
Beer and malt	↑
Animal feedstuffs	↑

(1) Including starch products.

Retail distribution

Food distribution, as a percentage of total retail distribution reached 33% for wholesale distribution and about 35% for retail outlets. The evolution of the sector which has undergone a process of rationalisation was confirmed by the figures produced by the Ministry for Industry, beginning with the 1991 Census. In 1994 a considerable fall (-8%) in the number of wholesale enterprises was recorded, the greatest fall in the last three years. This trend was quite evenly spread throughout the country, but was particularly evident in Northern Italy (-9%).

As regards retail outlets of fixed location, here, too there has been a process of rationalisation which has meant a reduction of 9.4%, as compared to 1993, in the number of retail outlets, which represents a 14.1% fall in the North and only 5.4% in the South. This evolution has also led to an increase in the ratio between population and the number of retail outlets of fixed location: the average increased from 207 inhabitants per outlet to 255 in 1994. This process of rationalisation has also affected average sales: according to estimates from the Ministry for Industry, average sales

Food marketing channels in Italy (*)

	NORTH		CENTRE		SOUTH		ITALY	
	%	% change on1991	%	% change on1991	%	% change on1991	n.	% change on1991
WHOLESALE	49.5	-19.5	18.8	-13.9	31.7	-13.9	42,079	-16.7
RETAIL (FIXED OUTLETS)	36.8	-26.4	18.8	-19.3	44.4	-12.5	220,856	-19.4
Wholesale/retail	25.6		19.1		13.6		19.1	
Inhabitants per retail outlet	310		260		207		255	

Source: Calculated on data from the Ministry of Trade and Industry. N.B. Figures in the above table refer to the results of the new Ministerial series linked to the 1991 census. Therefore the old series linked to the 1981 census have not been used. Information on mobile as opposed to fixed outlets is being gathered.

(*) As at 1st January 1995.

for retail outlets of fixed location amounted to 760 million lire per outlet, an increase of 14% as compared with 1993.
The forms of voluntary grouping, buying groups and associations showed a slight increase as a percentage of total retailers (12.8% as compared to 12.2% in 1993), in contrast to a fall of 5.4% in the number of associated retailers.

The modern retailing sector

On 1st January 1995 there were 4,198 supermarkets as compared with 3,906 in the previous year, with one of the most significant variations since 1988. Both the retail area and the total number of employees increased, the former amounting to 3.6 million m² (+7%) and the latter amounting to 83,000 units (+3.7%).
The number of hypermarkets increased to 210, with a retail area of about 1 million m². and the number of employees amounting to 27,500 units; this represented an increase of over 8% in both retail area and number of employees.
Modern retailing accounts for a steadily growing proportion of expenditure on retail food sales: it rose from 34.8% in 1993 to 37.4% in 1994.
Wholesale distribution in the form of cash and carry also experienced an increase in the number of outlets, amounting to 297, with a retail area for food of 713,000 m².

Food retailing by district (1)

Districts	Outlets	Sales area (m²)	Employees	No. of units per 100,000 inhabit.	Sales area m²/1.000 inhabit.
North	2,490	2.420,677	68,788	9.8	95.2
Centre	875	796,700	24,593	8.4	72.7
South	1,043	838,466	17,380	5.0	40.3
Total	4,408	4.055,843	110,761	7.7	70.9

(1) Autonomous supermarkets and food departments of large stores, as at 1st January 1995.
Source: Calculated on data from Ministry of Trade, Industry and Crafts.

Food Consumption

In 1995 expenditure on food and drink amounted to about 195,000 billion lire, an increase of 5.6% as compared with 1994. Prices grew on average by 6%; quantities, on the other hand, fell slightly (-0.4%). As compared with the previous year, there was a decline, above all, in the consumption of meat (-1.3%), fish (-2.4%), oils and fats (-2.4%) and alcoholic beverages (-0.8%). On the contrary, there were increases in consumption of dairy products and eggs (1.2%), sugar (0.6%), coffee and tropical beverages (1%) and of other food products (frozen, dietary, etc.).

The share of food consumption to total consumption fell to 17.6% of total household consumption expenditure, as compared with 17.9% in 1994; ten years earlier it had been 22.4%

Consumer behaviour is also changing: food consumption at home is declining whereas that outside the home is increasing (canteens, restaurants, etc.). If expenditure outside the home is taken into consideration, food expenditure increases considerably, to about 230,000 billion lire, including the expenditure of foreign tourists in Italy.

The most important category of expenditure is that on meat (52,000 billion lire), followed by: horticultural products, including potatoes (42,000 billion lire); bread and cereal-based products (24,000

The structure of food consumption

Product	% food expenditure	Annual average rate of change 1985/95 %	
		quantity	price
Bread and cereals	12.4	0.67	5.31
Meat	26.6	-0.17	4.47
Fish	5.9	1.21	5.62
Dairy production and eggs	15.0	0.70	5.19
Fats and oils	3.8	-0.46	4.46
Horticultural produce (1)	21.4	0.62	4.04
Other (2)	7.2	1.39	3.67
Alcoholic beverages	5.3	-1.45	6.18
Non-alcoholic beverages	2.4	6.45	5.08
TOTAL	100.0	0.44	4.77

(1) Including potatoes.
(2) Coffee, tea, cocoa, sugar, sweet etc.

Food consumption in the EU (Kg per head)

Products	Italy	France	Spain	Greece	Germany	United Kingdom	UE 12
Cereals (1)	120	80	74	105	71	93	81
Rice	5	4	7	5	2	5	5
Potatoes	41	73	92	87	73	108	80
Vegetables (2)	176	n.d.	162	247	79	n.d.	n.d.
Fruit including citrus (2)	124	n.d.	93	146	96	n.d.	n.d.
Milk (3)	61	98	126	61	90	135	110
Cheese	18	23	8	22	17	7	14
Butter	2	8	0	1	7	3	4
Total meat	90	110	107	81	97	n.d.	n.d.
Beef	26	29	13	21	20	n.d.	n.d.
Pork	34	38	55	22	58	n.d.	n.d.
Fats and oils (4)	31	22	n.d.	n.d.	23	n.d.	n.d.
Sugar (5)	26	34	29	29	32	37	32
Wine (6)	63	64	43	30	23	11	37

N.B. Data refer to the 1993/94 season; dairy products and meat to 1992.
(1) In flour equivalent; average EU 1992/93 season.
(2)Including processed, dried fruit and nuts; Greece 1992/93 for fruit.
(3) Including other fresh produce; 1993.
(4) Oils and fats.
(5) White sugar equivalent.
(6) Litres per head.

billion lire); fish (11,000 billion lire) and wine and other alcoholic beverages (over 10,000 billion lire). In the last ten years, the structure of food consumption shows a decrease in meat, oils and fats and wine and alcoholic drinks and an increase in dairy products, eggs and soft drinks. Levels of per capita consumption point strongly to the Mediterranean content of the Italian food demand, which, as compared with the average for the European Union, is almost 50% higher for cereal-based products, 50% for vegetables and 70% for wine. In contrast, consumption of milk is lower by 40% and that of pork by about 20%.

Foreign Trade

In 1995 the trade deficit for agro-food production amounted to 19,699 billion lire, an increase of about 900 billion lire as compared with the previous year. In relative terms, however, the 1995 trading results are not negative: as compared with the previous year, the increase in imports was modest (+11%) compared to that of exports (+20%), confirming the positive trend in foreign sales in recent years, aided by the depreciation of the lire. In the last five years trade opportunities in the Italian agro-food sector have increased considerably, and particularly in exports, with an increase in the propensity to export amounting to around 56%.

More than 65% of Italian agro-food trade is within the European Union: France and Germany, in particular, are Italy's major trading partners. There is strong growth in trade with

The agro-food balance and the agro-industrial system (*)

Products	1980	1990	1995
MACRO-ECONOMIC AGGREGATES			
Total agro-industrial production (1)	41,501	88,804	109,537
Imports	13,480	31,554	45,876
Exports	4,877	13,620	26,177
Balance	-8,603	-17,934	-19,699
Volume of trade (2)	18,357	45,174	72,053
Apparent consumption (3)	50,104	106,738	129,236
INDICATORS (%)			
Degree of self-sufficiency (4)	82.8	83.2	84.8
Propensity to import (5)	26.9	29.6	35.5
Propensity to export (6)	11.8	15.3	23.9
Degree of trade cover (7)	36.2	43.2	57.1

(*) Billion lire at current prices; data regarding agro-industrial production and trade also include "cured tobacco".
(1) VFO for agriculture, forestry and fishing and value added for the food industry.
(2) Sum of exports and imports.
(3) Agro-industrial production plus imports minus exports.
(4) Ratio between production and consumption.
(5) Ratio between imports and consumption.
(6) Ratio between exports and production.
(7) Ratio between exports and imports.

Foreign trade in agro-food products. 1995 (billion lire) (*)

Product	Imports	Exports	Nb (2) %
Cereals	2,746	103	-92.7
Fresh pulses and vegetables	623	1,458	40.1
Dried vegetables	784	218	-56.5
Fresh fruits	1,249	2,999	41.2
citrus	188	224	8.9
Textile fibres	1,229	42	-93.4
Oilseeds	710	10	-97.2
Coffee and spices	2,045	52	-95.0
Flowers and ornamental plants	524	512	-1.2
Uncured tobacco	225	303	14.9
Live animals	2,507	86	-93.4
beef	1,837	42	-95.5
Other livestock products	1,082	65	-88.6
Forest products	1,854	230	-77.9
Fish and game	1,034	254	-60.5
Other products	300	186	-23.4
TOTAL PRIMARY SECTOR	17,100	6,745	-43.4
Cereal products	506	3,810	76.5
pasta	9	1,649	98.9
Sugar and confectionery	1,228	1,267	1.6
Fresh and frozen meat	5,883	708	-78.5
Processed meat	273	860	51.7
Processed and preserved fish	3,013	306	-81.6
Processed vegetables	937	1,598	26.1
Processed fruit	521	1,248	41.1
Dairy products	5,205	1,554	-54.0
milk (1)	1,325	4	-99.4
cheese	2,266	1,242	-29.2
Oils and fats	2,257	1,491	-20.4
Oilseeds and cake	1,064	159	-74.1
Drinks	1,261	4,584	56.8
wine	259	3,215	85.1
Other food industry products	4,961	1,837	-46.0
TOTAL FOOD INDUSTRY	27,110	19,420	-16.5
TOTAL	44,210	26,165	-25.6

(1) Fresh and preserved.
(2) Nb = normalised balance (see glossary).
(*) Excluding "cured tobacco".

Central and Eastern European countries, the destination of more than 7% of Italian exports; there is strong growth, too, in trade with Mediterranean countries. Among the other industrialised countries, the United States has a dominant position, both as a buyer and supplier of agro-food products.

In the primary sector, cereals and live animals constitute the main imports, while fresh fruit and vegetables are Italy's prime exports. The overall trade deficit of products from the food industry is lower than that of products from the primary sector; cereal derivatives and wine are the main export sectors amongst processed products, while meat, fish and dairy products account for a significant proportion of imports.

Geographical distribution of Italian agro-food trade, 1995 (billion lire) (*)

Countries	Imports	%	Exports	%	Nb (2)
EUROPEAN UNION 15	29,223	66.1	17,641	67.4	-24.7
France	8,848	20.0	3,631	13.9	-41.8
Germany	5,895	13.3	6,958	26.6	8.3
Netherlands	4,318	9.8	981	3.7	-63.0
United Kingdom	1,815	4.1	1,949	7.4	3.6
Belgium and Lux.	1,532	3.5	877	3.4	-27.2
Spain	2,065	4.7	1.080	4.1	-31.3
Denmark	1,767	4.0	308	1.2	-70.3
Greece	1,368	3.1	550	2.1	-42.6
Austria	904	2.0	703	2.7	-12.5
CENTRAL-EAST EUROPE	2,398	5.4	1.918	7.3	-11.1
Poland	302	0.7	161	0.6	-30.5
Hungary	462	1.0	101	0.4	-64.1
CIS	1,074	2.4	641	2.4	-25.2
OTHER DEVELOPED COUNTRIES	3,670	8.3	4,025	15.4	4.6
Switzerland	620	1.4	1,226	4,7	32,8
Norway	49	0,1	91	0,3	30,0
U.S.A.	1,539	3.5	1,726	6.6	5.7
Canada	288	0.7	310	1.2	3.7
MEDITERRANEAN COUNTRIES(1)	1,561	3.5	1,071	4.1	-18.6
REST OF THE WORLD	7,359	16.6	1,511	5.8	-65.9
Argentina	895	2.0	107	0.4	-78.6
Brasil	1,148	2.6	326	1.2	-55.8
Rest of America	984	2.2	102	0.4	-81.2
China	417	0.9	12	0.0	-94.4
TOTAL	44,210	100.0	26,165	100.0	-25.6

(*) Excluding "cured tobacco".
(1) Mediterranean countries of non-EU Europe, Africa and Asia.
(2) Normalised balance.

FARM STRUCTURE

The EEC Universe

Between November 1993 and February 1994 ISTAT carried out the first of the three two-yearly sample surveys on farm structures required by the European Union following the Fourth Agricultural Census of 1990.

The first provisional results are reported here and refer to the so-called "EEC universe" which is smaller than the national one in that farms with less than one hectare of UAA and whose sales are less than 1,500,000 lire are not considered.

At the same time, two other Community surveys were carried out, using the same questionnaire, which aimed to gather information on the area of land sown to cereals and the corresponding level of production.

Farms and Farm Area

From the 1993 Survey on farm structures, 2.5 million Italian farms were included in the EEC universe, with a total area of 20.6 million hectares and a UAA of 14.7 million hectares.

35.1% of the farms were in 3 southern Regions, Campania (9.4%), Puglia (12.3%) and Sicily (13.4%), and 16.6% of farms were in central Italy, nearly half of which were situated in the Lazio Region.

Every Region witnessed a decrease in the number of farms, ranging from -1.9% in Molise to -9.0% in Sicily, while figures for farm area were varied.

As regards UAA, though there was an overall fall, Piemonte, Veneto, Fruili Venezia Giulia, Tuscany and Umbria recorded increases of between 0.1% and 4.3%.

The number of farms and total area (ha)

	Farms	UAA	% change on 1990	
			Farms	UAA
ITALY	2,488,393	14,736,048	-6.6	-1.4
North-west	302,906	2,375,997	-6.9	-0.8
North-east	427,798	2,746,741	-6.1	-1.4
Centre	413,023	2,701,504	-5.5	0.8
South	910,772	4,023,185	-6.5	-2.9
Islands	433,894	2,888,621	-8.2	-1.8

Number of farms and total area, per Region (ha)

REGIONS	Farms	UAA	% change on 1990	
			Farms	UAA
PIEMONTE	154,092	1,119,888	-6.1	0.4
VALLE D'AOSTA	7,124	93,653	-4.9	-2.6
LOMBARDIA	104,172	1,080,980	-7.9	-1.7
TRENTINO A.A.	47,632	400,624	-3.4	-4.6
Bolzano	23,090	260,365	-3.1	-4.4
Trento	24,542	140,259	-3.7	-5.0
VENETO	195,146	879,107	-7.3	0.1
FRIULI V.GIULIA	49,750	256,363	-2.8	0.3
LIGURIA	37,518	81,476	-7.4	-3.5
EMILIA ROMAGNA	135,270	1,210,647	-6.5	-1.7
TOSCANA	112,278	956,899	-2.6	4.3
UMBRIA	49,311	403,383	-4.5	2.3
MARCHE	70,721	541,436	-6.4	-1.2
LAZIO	180,713	799,786	-7.1	-2.5
ABRUZZO	90,618	503,085	-8.4	-3.0
MOLISE	37,912	240,454	-1.9	-3.7
CAMPANIA	234,226	634,031	-7.8	-3.5
PUGLIA	305,267	1,418,643	-6.3	-1.8
BASILICATA	72,171	588,507	-3.6	-5.3
CALABRIA	170,578	638,465	-6.0	-2.3
SICILIA	333,000	1,534,702	-9.0	-3.3
SARDEGNA	100,894	1,353,919	-5.4	-0.1

The Utilisation of Land

More than 40% of farm area under permanent tree crops (vineyards, olive groves, orchards, etc.) - amounting to 2,693 thousand hectares shared between 2/3 of Italian farms - is concentrated in the southern Regions, which also own more than a quarter of the area under arable crops. The highest proportion of farm area under permanent pasture (meadows and pasture) is found on the Islands while the Centre of Italy is characterised by widespread forest cultivation (27.6%).

Division of farmland according to utilisation (ha)

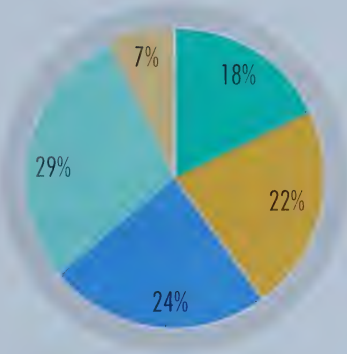
TERRITORIAL DIVISIONS	UAA				Forest area (c)	Other areas (d)	Total
	Arable crops (a)	Permanent meadows and pasture	Permanent cultivations (b)	Total			
North-west	1,382,636	821,477	171,883	2,375,996	647,567	366,936	3,390,499
North-east	1,720,955	667,746	358,040	2,746,741	927,584	465,961	4,140,286
Centre	1,739,151	522,190	440,163	2,701,504	1,176,312	388,184	4,266,000
South	2,079,887	773,906	1,169,393	4,023,186	723,935	380,937	5,128,058
Islands	1,202,349	1,132,446	553,826	2,888,621	546,511	221,916	3,657,048
ITALY	8,124,978	3,917,765	2,693,305	14,736,048	4,021,909	1,823,934	20,581,891

(a) Including vegetables gardens.
(b) Including (edible) chestnut groves.
(c) Including poplar groves.
(d) Total of unused agricultural areas and other areas.

Livestock

Livestock farming is mainly concentrated in the central and northern Regions of Italy where the numbers of farms with livestock varies from 44% and 49% of total farms, whereas in the South only 27.4% of farms raise livestock.
The territorial differences become even more apparent if single species of animal are considered: the farms in the North can boast 69.2% of national cattle stock and 77.5% of pigs, concentrated in about 47 thousand farms (16.4% of total pig farms), with an average of 139 head per farm. In contrast, sheep and goats, traditionally raised in marginal and mountain areas are almost exclusively raised in farms in the Centre-South, and in particular in Sardinia.

Livestock farms by territorial division



NUMBER OF FARMS	
ITALY	847,822
North-west	149,372
North-east	186,525
Centre	199,820
South	249,406
Islands	62,699

No. of livestock farms and no. of head by main species

	BEEF		SHEEP		PORK		POULTRY		CHICKENS FOR MEAT	
	Farms	Head	Farms	Head	Farms	Head	Farms	Head	Farms	Head
North-west	63,005	2,970,451	12,545	235,768	15,834	3,750,753	95,209	36,196,561	38,050	21,855,696
North-east	71,013	2,281,961	5,941	172,217	30,967	2,759,296	141,118	80,308,399	71,691	49,576,631
Centre	40,380	672,372	39,489	2,566,573	72,914	975,488	165,061	17,243,039	117,954	10,779,605
South	66,805	919,066	62,356	2,072,244	142,637	562,146	191,531	12,892,816	136,821	6,536,658
Islands	26,123	747,477	30,017	5,342,156	23,347	348,657	13,435	3,187,507	4,037	990,975
ITALY	267,326	7,591,327	150,348	10,388,958	285,699	8,396,340	606,354	149,828,322	368,553	89,739,565

Farm Families

From the 1993 Survey, more than half (54.2%) of Italian farm families lived in the South and the Islands.
The average size of the farm family (2.48) was smaller than that of families in general (2.80).

The largest families were found in the North-east of Italy (2.83), where nearly 13% of families had more than 5 members whereas the smallest families were found on the Islands (2.02), and particularly in Sicily (1.9).

71.1% of farm family members worked, though the average amount of work varied considerably, from 90 days for the manager, to 68 days for the spouse, and 79 days for other family members.

Farm families by no. of components

	COMPONENTS						TOTAL		
								Components	
	1	2	3	4	5	6 and over	Families	No.	Average per family
North-west	20.3	35.0	20.7	15.0	6.3	2.7	298,735	783,045	2.62
North-east	18.8	30.0	21.2	17.1	7.9	5.0	424,397	1,202,184	2.83
Centre	22.9	34.0	18.8	15.0	6.7	2.6	409,122	1,054,112	2.58
South	26.1	37.6	14.6	12.9	6.4	2.5	909,612	2,217,684	2.44
Islands	51.1	20.8	10.9	10.1	5.3	1.6	433,409	876,763	2.02
ITALY	28.0	32.4	16.5	13.7	6.5	2.8	2,475,275	6,133,788	2.48

The Age of Farm Managers

About 83% of farm managers in Italy are more than 45 years old; more specifically, 48.5% fall into the age range "45 - 64 years old", while 34.4% are over 65. In contrast, the age range "under 25" barely reaches 0.5%.

In nearly all the Northern Regions, there is a high proportion of managers over the age of 45. This is particularly the case in Fruili Venezia Giulia and Liguria, where 86.5% and 92.5% of farm managers, respectively, are over 45.

A different picture emerges in Bolzano and Trento, where more than a quarter of farms are managed by "young" managers, and especially in Bolzano where the under 25s band reached 2.3%, and the successive one 27.9%.

In the South and Islands the proportion of "elderly" managers is smaller, whereas the category "25-44 years old" increases, amounting to 21.6% on the Islands.

Farm managers by age group

	AGE GROUPS				
	Less than 25	25 - 44	45 - 64	65 and over	TOTAL
North-west	1,851	40,963	151,138	104,783	298,735
North-east	2,868	67,334	205,246	148,949	424,397
Centre	1,492	63,364	202,080	142,186	409,122
South	3,427	146,650	448,478	311,057	909,612
Islands	1,832	93,640	194,336	143,601	433,409
ITALY	11,470	411,951	1,201,278	850,576	2,475,275

Pluriactivity

Nearly two-thirds of farm family members are involved in full-time agricultural work, while a further 30.7% work mainly or exclusively in other, paid employment outside the farm. Part-time work is particularly widespread amongst family members other than the manager and spouse (54%), and is usually in the services sector. In contrast, 73% of managers and 77.5% of spouses work full-time on the farm.

Family components by on-farm and non-farm activity

Components	FULL-TIME	PART - TIME				
		Secondary		Main or exclusive		
		Total	in agriculture	Total	in agriculture	in industry
Farm manager	1,820,908	88,972	29,208	565,395	108,845	163,004
Spouse	841,144	33,932	7,917	210,206	49,151	57,922
Other family members	513,792	42,187	9,035	653,894	84,843	241,033
- who work on the farm	513,792	42,187	9,035	282,188	62,547	93,664
- who do not work on the farm	-	-	-	371,706	22,296	147,369
Kinsmen	156,022	9,652	3,598	125,237	32,882	33,897
TOTAL	3,331,866	174,743	49,758	1,554,732	275,721	495,856

Agricultural Contracting

Around 1,140 thousand farms use mechanical machinery supplied by enterprises specialised in agricultural activity (ploughing, sowing, harvesting etc.) Of these, 36.5% are in the southern Regions. The hiring of agricultural contractors (passive contracting) is most widespread in the North-east (54.7% of farms in that area). The central Regions are, in contrast, those that least turn to outside help (38.5% of farms in the area), though the average number of days worked in these cases is higher (4 days).

Farms with passive agricultural contracting

	Number	Days worked	Percentage of total farms	Average no. of days per farm
North-west	122,771	400,666	10.8	3.3
North-east	233,094	791,001	20.4	3.4
Centre	159,155	632,125	14.0	4.0
South	415,221	1,425,707	36.5	3.4
Islands	208,169	708,287	18.3	3.4
ITALY	1,138,410	3,957,786	100.0	3.5

Types of Farming

More than 82% of Italian farms are specialised in the production of certain crops or livestock. Specialisation is highest on the Islands (88.7% of farms in those areas), whereas the lowest levels of specialisation are to be found in the Centre (75.6%) , and particularly in Umbria (67.3%).

As regards specific types of farming, 37% of farms in North-eastern Italy, unlike other areas, are specialised in arable crops (rotated fodder, industrial crops, field vegetable crops, maize, etc.) as compared with 23% specialised in permanent tree crops. Tree crops, are, in contrast, the prevalent cultivations in specialised farms in the South and Islands, in both cases involving more than 55% of total farms.

As regards the average number of days worked per farm, this decreases in both specialised and non-specialised farms, moving from North to South. More specifically, in specialised farms the average varies from 244 days in North-eastern Italy to 111 days on the Islands. As regards the kind of specialisation, the most labour-intensive is the cultivation of fruit, vegetables and flowers, in all areas except for the North-east where production of grain-fed animals is more labour-intensive. The average number of days worked are, on the other hand, lower for arable and tree crops.

In terms of Standard Gross Margin (SGM; see glossary) the areas show very varied results. In particular, the cultivation of fruit, vegetables and flowers produces the highest results in the Centre, South and Islands, whereas in the North, the best results were achieved with the production of grain-fed animals. Finally, it is worth noting that in the same area, with the same number of days worked but with different production, incomes may vary considerably.

Farm specialisation and average days worked

	SPECIALISED FARMS						MIXED FARMS				GRAND TOTAL
	Arable	Flowers/ vegetables	Permanent crops	Herbivorous animals	Granivorous animals	Total	Mixed crops	Mixed livestock	Crops/ livestock	Total	
North-west	73,550	8,371	88,167	77,819	2,788	250,695	24,175	4,910	22,614	51,699	302,394
North-east	157,632	4,420	100,030	79,828	2,791	344,701	48,524	7,318	24,919	80,761	425,462
Centre	108,278	5,352	158,015	37,037	1,446	310,128	63,592	9,517	27,239	100,348	410,476
South	195,605	8,060	499,294	35,638	2,050	740,647	116,186	13,018	31,930	161,134	901,781
Islands	66,732	6,241	242,811	49,646	1,904	367,334	28,344	4,726	13,792	46,862	414,196
ITALY	601,797	32,444	1,088,317	279,968	10,979	2,013,505	280,821	39,489	120,494	440,804	2,454,309

AVERAGE DAYS WORKED PER FARM

North-west	200.0	463.0	198.0	298.6	659.2	243.8	225.5	395.9	302.6	275.4	249.2
North-east	112.1	719.4	244.8	246.4	594.3	193.4	204.9	301.1	290.8	240.1	202.3
Centre	160.0	756.6	140.8	242.5	394.1	171.5	194.1	301.9	221.3	211.7	181.3
South	166.8	482.8	138.9	252.1	170.6	155.6	220.9	369.4	298.0	248.2	172.1
Islands	99.2	612.3	82.1	209.7	92.4	111.2	164.3	263.8	207.2	187.0	120.0
ITALY	147.8	580.0	141.0	254.6	418.2	167.4	206.7	331.1	269.6	235.1	179.6

Average SGM per farm (in ESU)

	SPECIALISED FARMS						MIXED FARMS				GRAND TOTAL
	Arable	Flowers/ vegetables	Permanent crops	Herbivorous animals	Granivorous animals	Total	Mixed crops	Mixed livestock	Crops/ livestock	Total	
North-west	12.8	44.8	6.7	14.9	75.5	13.1	5.9	22.8	13.2	10.7	12.7
North-east	8.5	33.9	14.2	10.0	79.4	11.4	10.8	11.8	12.8	11.5	11.4
Centre	8.2	70.2	5.3	7.9	30.9	7.8	6.1	6.8	6.3	6.2	7.4
South	6.0	36.5	4.4	7.4	7.6	5.3	5.0	6.6	6.3	5.4	5.3
Islands	5.5	43.3	4.2	7.6	4.0	5.6	7.6	11.0	7.1	7.8	5.8
ITALY	7.8	45.2	5.6	10.3	45.5	7.8	6.6	10.1	9.0	7.6	7.7

Economic Size

The low level of profitability that typifies Italian farming enterprises is reflected in the fact that more than two-thirds of farms earn no more than 4 ESU (see glossary); that is to say, about 7.2 million lire. About 49% of farms earn no more than 2 ESU and produce only 5.5% of total SGM; 28.2% produce an SGM of less than 1 ESU (lees than 1.8 million lire p.a.) though using labour worth 46 working days.

The smallest farming enterprises (less than 2 ESU) are mainly found on the Islands, where they represent 53% of total farm holdings. The situation is different for farms in the northern Regions, where economic size is greater because of more profitable production choices such as dairy cows, maize, soya, rotated fodder, DOC wines, fruit, etc. In the North of Italy the biggest farms (100 or more ESU) represent 1.5 - 2%, as compared with only 0.4 - 0.9% in the areas of Central and Southern Italy.

Number of farms and average days worked by class of economic size (ESU)

	CLASS OF ECONOMIC SIZE										
	Less than 1	1 - 2	2 - 4	4 - 6	6 - 8	8 - 12	12 - 16	16 - 40	40 - 100	100 and over	TOTAL
North-west	79,119	51,682	53,305	22,125	13,926	16,178	11,247	30,704	18,101	6,007	302,394
North-east	106,786	67,949	68,390	35,958	23,884	30,035	21,231	46,472	18,956	5,801	425,462
Centre	117,973	89,520	77,174	34,466	20,326	22,238	12,982	23,086	9,028	3,683	410,476
South	252,010	214,824	186,605	76,655	44,639	44,810	24,180	42,934	11,469	3,655	901,781
Islands	136,030	83,204	72,197	34,525	20,087	22,433	14,579	22,551	6,831	1,759	414,196
ITALY	691,918	507,179	457,671	203,729	122,862	135,694	84,219	165,747	64,385	20,905	2,454,309
AVERAGE DAYS WORKED PER FARM											
North-west	62.1	119.6	155.9	249.4	262.0	343.7	394.0	522.8	724.7	1.269.9	249.2
North-east	42.7	63.2	113.6	169.3	222.3	261.5	338.6	449.5	736.5	1.403.7	202.3
Centre	45.0	83.5	142.4	203.3	253.8	315.3	406.6	539.3	756.6	1.877.0	181.3
South	46.8	94.3	155.9	212.0	275.4	335.7	419.1	530.4	923.5	1.903.6	172.1
Islands	37.5	62.7	92.3	124.9	182.9	223.5	285.0	380.8	640.5	1.487.1	120.0
ITALY	45.8	85.6	137.3	192.3	244.9	298.3	370.3	487.2	759.1	1.543.1	179.6

Farms and UAA

According to the results of the structural Survey in 1993, more than 71% of farms in the Community are concentrated in Mediterranean countries, and Italy continues to record the largest proportion, with more than 1/3 of the total number, followed by Spain (19.1% of the Community universe). The Mediterranean region, however, amounts to barely 49 million hectares of UAA, or 39.5%; consequently, while farms in northern European countries possess an average UAA ranging from Holland's 17 hectares to the United Kingdom's 67 hectares, in the Mediterranean regions UAA does not exceed 8 hectares with the exception of Spain (17.9 hectares).

In the last three years, except in the United Kingdom (+0.2%), farm size has decreased in all countries, with falls varying from 18.3% in Portugal to 3.6% in Greece.

In contrast, the UAA has fallen in only 8 countries and to a very limited extent, no more than 3.7% (Ireland); Spain, Luxembourg and Holland all recorded slight increases of between 0.2% and 0.7%.

Farms and UAA in the EU

COUNTRIES	FARMS (000 units)	UAA (ha)	CHANGES 1993 ON 1990			
			Absolute		%	
			Farms (000 units)	UAA ha	Farms	UAA
Belgium	76.4	1.344.4	-8.7	-0.1	-10.2	0.0
Denmark	73.8	2.739.1	-7.5	-40.0	-9.2	-1.4
Germany	606.1	17.022.1	-47.5	-26.0	-7.3	-0.2
Greece	819.2	3.538.7	-30.9	-122.5	-3.6	-3.3
Spain	1.383.9	24.713.7	-209.7	182.6	-13.2	0.7
France	801.3	28.107.2	-122.3	-79.2	-13.2	-0.3
Irleland	159.4	4.277.6	-11.2	-164.2	-6.6	-3.7
Italy	2.488.4	14.736.0	-176.2	-210.7	-6.6	-1.4
Luxembourg	3.4	127.2	-0.6	0.5	-13.9	0.4
Netherlands	119.7	2.014.8	-5.1	3.5	-4.1	0.2
Portugal	489.0	3.949.9	-109.7	-55.7	-18.3	-1.4
United Kingdom	243.5	16.382.7	0.4	-116.0	0.2	-0.7
EU 12	7.264.0	118.953.4	-728.9	-627.8	-9.1	-0.5

Farm size

More than 58% of farms in the Community fall into the category, in terms of UAA, of farms with less than 5 hectares; of these farms, more than 87% are situated in Mediterranean countries, in which this category dominates, representing more than half the total number of farms in these countries. In particular, Italy has nearly 50% of the farms in the Community belonging to this category (45.1% of the total in the Community).

In contrast to this situation, only 2.6% of farms have an UAA of more than 100 hectares. The largest farms are found mainly in the United Kingdom (15.9% of national total), France (7.6%), Luxembourg (5.9%) and Denmark (5.8%).

Farms by class of UAA in EU countries (000 units)

COUNTRIES	CLASS OF UAA (ha)					
	Less than 5	5 - 20	20 - 50	50 - 100	100 and over	TOTAL
Belgium	26.7	25.6	18.7	4.5	0.9	76.4
Denmark	1.9	28.8	26.7	12.1	4.3	73.8
Germany	191.6	206.9	141.8	49.3	16.4	606.1
Greece	620.2	175.7	20.0	2.6	0.6	819.2
Spain	804.5	371.9	114.9	49.6	43.1	1,383.9
France	221.1	181.3	205.3	132.4	61.2	801.3
Ireland	16.5	67.1	56.8	15.2	3.7	159.4
Italy	1,927.9	426.5	93.5	26.7	13.9	2,488.4
Luxembourg	0.9	0.6	0.8	1.0	0.2	3.4
Netherlands	40.8	41.8	30.4	5.9	0.9	119.7
Portugal	382.1	82.6	14.8	4.1	5.3	489.0
United Kingdom	37.1	67.6	58.9	41.2	38.7	243.5
EU 12	4,271.4	1,676.1	782.5	344.8	189.2	7,264.0

Livestock farms

Livestock farms are most widespread in Central and Northern Europe and Portugal, where livestock production is present on 80% of farms. In contrast, livestock production is concentrated in little more than a third of farms in Italy and Spain. Finally, it is worth noting that Mediterranean countries also differ from other Community countries in the much smaller farm size in terms of number of livestock.

No. of livestock farms by main species (000 units)

COUNTRIES	FARMS		AVERAGE NO. OF HEAD PER FARM				
	Number	% of total farms	Beef	Pork	Sheep	Goats	Poultry
Belgium	61.3	80.3	63	472	28	9	2,723
Denmark	53.9	73.0	65	430	31	..	1,802
Germany	458.3	75.6	51	106	47	..	405
Greece	494.3	60.3	11	15	51	25	75
Spain	514.9	37.2	20	56	157	32	312
France	588.7	73.5	54	132	84	28	687
Ireland	155.1	97.3	49	604	148	3	645
Italy	847.8	34.1	28	29	69	17	247
Luxembourg	2.8	82.4	91	144	34	5	54
Netherlands	83.6	69.8	80	556	75	20	17,577
Portugal	391.9	80.1	8	15	33	8	102
United Kingdom	191.0	78.4	84	479	464	8	3,308
EU 12	3,843.7	52.9	43	91	124	22	410

ECONOMIC PERFORMANCE - RESULTS FROM THE FADN

Farm incomes in 1994

INEA is the official body responsible for co-ordination between the Italian State and the EU for the management of the Farm Accounting Data Network and it handles a sample survey every year of between 16,000 and 20,000 farms.

The collection of the accounting data takes place in collaboration with Regional authorities and Farmers' Professional Organisations using a methodology devised by INEA which clearly illustrates structural characteristics, factor endowment and cost structure.

The raw data, duly checked and processed, are fed into a national data bank and presented in special publications. Further, and more detailed, information is available at each regional office of the INEA.

Average farm data by altimetric zone, 1994

	FARMS number	UAA ha	WU no.	VFO	Variable costs	Fixed cost	Net income
				000 lire			
TOTAL	17,040	20.33	1.76	87,477	38,293	21,163	36,744
MOUNTAINS	3,555	25.28	1.80	73,816	34,857	18,981	31,673
HILLS	8,358	19.94	1.74	72,610	29,922	17,380	31,207
PLAINS	5,127	17.55	1.77	121,187	54,323	28,842	49,285

Average farm data by district, 1994

	FARMS number	UAA ha	WU no.	VFO	Variable costs	Fixed costs	Net income
					000 lire		
TOTAL	17,040	20.33	1.76	87,477	38,293	21,163	36,744
NORTH	6.823	19.19	1,96	122,595	57,006	31,133	48,105
CENTRE	3,301	20.77	1.85	71,180	28,238	20,397	27,874
SOUTH	6,916	21.25	1.53	60,610	24,631	11,692	29,769

Data by district - changes 1994/93

	VFO (000 lire)		% change	Variable costs (000 lire)		% change
	1993	1994		1993	1994	
TOTAL	75,643	87,477	15.64	34,522	38,293	10,92
North	108,166	122,595	13.34	53,260	57,006	7,03
Centre	65,449	71,180	8.76	27,076	28,238	4,29
South	50,725	60,610	19.49	20,839	24,631	18,20

Average farm data by ESU, 1993

	NO. FARMS	UAA ha	WU No.	VFO	Variable costs	Fixed costs	Net income
				000 lire			
TOTAL	17,040	20.33	1.76	87,477	38,293	21,163	36,744
2-4 ESU	828	5.84	1.12	21,134	8,422	6,759	7,724
4-8 ESU	3,248	9.90	1.24	27,614	11,126	8,550	10,880
8-16 ESU	5,326	15.67	1.51	49,268	19,731	13,290	21,273
16-40 ESU	5,209	24.87	1.92	95,039	40,061	22,464	42,380
40-100 ESU	2,003	34.57	2.64	205,770	95,060	44,992	85,500
over 100 ESU	426	63.99	4.03	501,895	247,034	115,795	185,610

Average farm data by principle types of farming (1), 1994

	NO. FARMS	UAA ha	WU No.	VFO	Variable costs	Fixed costs	Net income
				000 lire			
TOTAL	17,040	20.33	1.76	87,477	38,293	21,163	36,744
Arable	4,202	22.56	1.52	73,913	26,821	19,813	28,633
Horticultural	1,208	1.89	2.05	104,623	42,112	20,782	41,802
Permanent crops	3,973	8.94	1.64	63,137	18,028	17,748	27,642
Herbivorous animals	4,033	35.05	1.98	124,438	67,458	26,229	56,355
Granivorous animals	49	13.43	2.19	460,576	316,554	58,576	108,258
Mixed crops	1,688	14.80	1.69	61,447	22,861	17,367	24,065
Mixed livestock	472	19.68	1.97	87,098	46,362	20,863	35,706
Mixed	1,415	26.58	1.93	94,377	48,959	23,973	39,164

(1) Types of farming - see glossary.

PRODUCTS OF DESIGNATED ORIGIN AND WITH SPECIFIC CHARACTER AND FROM ORGANIC FARMING

Products of Designated Origin

The European Union definition

Under present conditions, national and Community regulations for recognition and protection of designations of origin have an important role to play both in differentiating supply at firm level and as an instrument for increasing the competitive capacity of the national agro-food system. In particular, the recent EEC Regulations 2081 and 2082 issued by the Council of Ministers on 14th July 1992 concerning the definition and regulation of DPO (designation of protected origin) and PGI (protection of geographical indications) and certificates of specific character constitute the basis for administering the measures of protected designation with the specific aim of contributing to the promotion of typical products.

Designation of protected origin (PDO) and protected geographical indication (PGI) differ in that in order to obtain recognition of the first of these, all phases of production and processing must take place in a limited geographical area, whilst for the second, it is sufficient that the quality or reputation can be attributed to the geographical origin whilst some part of the production process may take place outside that area.

The certificate of specific character refers to an element or to a set of elements which distinguish an agricultural or food product from analogous products belonging to the same category; in effect, it is a characteristic which derives from the application of methods of production; products whose specific character derives from their geographical origin or from the application of technical innovation are excluded.

The specifications of the product must supply all the indications necessary for recognition and constitute the indispensable basis for the declaration of conformity of the product.

Community regulations assign to Management Consortia, whose responsibilities are set out by each member state, the task of guaranteeing that products carrying the mark of the protected origin or attestation of specificity correspond with the standards laid out in the specification.

The law governing the designation of controlled origin for cheeses dates back to 1954 and it was the first to be applied in Italy.

The law of 10th April 1954, no. 125, recognises as products with designation of origin those cheeses produced within a limited geographical area, consistently using local methods and whose characteristics derive mainly from the specific conditions of the environment in which they are produced.

The law recognises as products of specific character those cheeses produced on national territory consistently using local methods and whose characteristics derive from particular techniques of production.

Cheeses with designation of origin

Asiago	Murazzano
Bitto	Parmigiano Reggiano
Brà	Pecorino Romano
Caciocavallo Silano	Pecorino Sardo
Caciotta di Urbino	Pecorino Siciliano
Canestraro Pugliese	Pecorino Toscano
Castelmagno	Provolone Valpadana
Fiore Sardo	Quartirolo Lombardo
Fontina	Ragusano
Formai De Mut dell'alta Val Brembana	Raschera
Gorgonzola	Robiola Roccaverano
Grana Padano	Taleggio
Montasio	Toma Piemontese
Monte Veronese	Valle d'Aosta Fromadzo
Mozzarella di bufala campana	Valtellina Casera

It also provides for the establishment of particular consortia to supervise the correct application of the norms.

Other Products

The following products have been recognised, by appropriate laws, as being of designated origin:

- *Prosciutto di Parma*
- *Prosciutto di San Daniele*
- *Prosciutto Berico - Euganeo*
- *Prosciutto di Modena*
- *Salame di Varzi*
- *Salame Brianza*
- *Culatello di Zibello*
- *Valle d'Aosta Jambon de Bosses*
- *Valle d'Aosta Lard d'Arnad*
- *Prosciutto di Carpegna*
- *Prosciutto Toscano*
- *Coppa, Pancetta, Salame Piacentino*

Products of protected geographical origin - PGI

- *Nocciola (hazel nuts) del Piemonte*
- *Fungo (mushrooms) di Borgotaro*
- *Cappero (capers) di Pantelleria*
- *Castagna (chestnuts) di Montella*
- *Arancia Rossa (red oranges)di Sicilia*
- *Speck dell'Alto Adige*
- *Bresaola della Valtellina*
- *Fagiolo di Lamon (beans) della Vallata Bellunese*
- *Fagiolo (beans) di Sarconi*
- *Farro ("triticum spelta") della Garfagnana*
- *Peperone (peppers) di Senise*
- *Marrone (chestnuts) del Mugello*
- *Marrone (chestnuts) di Castel del Rio*
- *Riso Nano (rice) Vialone Veronese*
- *Radicchio Rosso di Treviso*
- *Radicchio Variegato di Castel Franco*

Other PDO products

- *Aceto balsamico (aromatic vinegar)*
- *Aceto balsamico tradizionale (aromatic vinegar) di Modena e di Reggio Emilia*
- *Pomodoro (tomatoes) S. Marzano dell'Agro Sarnese-Nocerino*

Wines of designated origin

The law of 10th February 1992, no. 164 regulates designation of origin for wines. By designation of origin for wines is understood the geographical name of a particular wine-producing area, used to indicate a well-known quality product whose characteristics are dependent on the natural environment and skills.
By typical geographical indication for wines is understood the geographical name of an area used to indicate the product emanating from it.

These products are classified into:

- *designation of controlled and guaranteed origin (DOCG)*
- *designation of controlled origin (DOC)*
- *typical geographical indication (TGI)*

During 1995 a number of TGI for regions were recognised by Ministerial Decree.

Italian DOC wines by Region

Valle d'Aosta	1	Umbria	8
Piemonte	38	Lazio	19
Liguria	4	Abruzzo	2
Lombardia	13	Molise	2
Trentino - Alto Adige	8	Campania	15
Veneto	17	Basilicata	1
Friuli - Venezia Giulia	8	Puglia	24
Emilia Romagna	14	Calabria	10
Toscana	24	Sicilia	11
Marche	10	Sardegna	18

N.B. There are altogether 241 DOC wines in Italy, less than the sum for the Regions, since 6 are inter-Regional.

Wines with designation of controlled and guaranteed origin (DOCG)

Regions		Designation	Additional indication permitted on label
PIEMONTE	b/s	Asti spumante o Asti e Moscato d'Asti	
	r	Barbaresco	riserva
	r	Barolo	
	r	Gattinara	riserva
LOMBARDIA	b/s	Franciacorta rosè	
EMILIA ROMAGNA	b/p	Albana di Romagna	
TOSCANA	r	Brunello di Montalcino	riserva
	r	Carmignano	riserva
	r	Chianti	classico, riserva Colli Aretini, Colli Fiorentini Colline Pisane, Colli Senesi, Montalbano, Ruffina
	b	Vernaccia di San Gimignano	riserva
	r	Vino nobile di Montepulciano	riserva
UMBRIA	r/p	Montefalco Sagrantino	
	r	Torgiano	riserva
CAMPANIA	r	Taurasi	riserva

b/s = sparkling white b/p = sweet white (passito) b = white r = red r/p = sweet red (passito)

Virgin and Extra-Virgin Olive Oils

The recognition of designation of origin for virgin and extra-virgin olive oils is regulated by the law 169/92.

By designation of origin for virgin and extra-virgin olive oils is meant the geographical name which defines the area characterised by specific natural or human factors used to designate virgin and extra-virgin oils originating from there and whose characteristics are due essentially to the olive groves from which the basic material is drawn and to the techniques of production.

Such a denomination is reserved for oils which meet the conditions and requisites established in the relative specifications for production.
In order to regulate the use of designations of origin, consortia of oil producers have been established and recognised.

A national committee for supervising designations of origin for oils has been established, based at the Ministry for Agricultural, Food and Forestry Resources in order to examine specifications of production and to promote research and propaganda for improving and disciplining production of oils.

In order to implement the law, decrees subsequently established:

- *a national register of tasters of olive oils (23.6.1993);*
- *norms of recognition of PDO, for the register of olive groves, for the declaration of oil production, for the list of varieties of olives admitted to the register of olive groves, for the activity of the commission for tasting oils (4.11.1993).*

In implementing Community regulations, during 1994 and 1995 the following proposals for specifications have been presented to the national Committee to be registered as PDO:

- *Valli trapanesi*
- *Laghi lombardi*
- *Veneto*
- *Colline salernitane*
- *Penisola sorrentina*
- *Cilento*
- *Toscano o Toscana*
- *Brisighella*
- *Sabina*

- *Canino*
- *Riviera ligure*
- *Terra di Bari*
- *Dauno*
- *Antica terra d'Otranto*
- *Penisola sorellina*
- *Laconia*
- *Collina di Brindisi*
- *Bruzio*
- *Umbria*
- *Aprutino pescarese*
- *Colline teatine*
- *Monti iblei*
- *Monte Etna*
- *Val di Mazara*
- *Carda*

Organic Farming

According to Community norms, by organic agriculture is meant a system of farm management in which substantial restrictions in the use of fertilisers and pesticides are observed, to safeguard the environment and to promote lasting agricultural development. Organic farming represents the answer to the objectives of reorientation in agricultural production and in particular moves towards more extensive cultivation, within the wider context of environmental conservation.

Regulation 2092, passed in 1991, concerns methods of organic production for agricultural products and can be considered as recognition at European level of this productive organisation, defining criteria and rules for Community operators. This law is accompanied by Regulation 2078 of 1992 regarding methods of agricultural production compatible with protection of the environment and nature, within the accompanying measures laid out in the CAP reforms.

In the EU, the number employed in organic agriculture and related activities doubled between 1987 and 1994, from about 7,500 to 15,000. In the same period the area

Area given over to organic agriculture (ha) (*)

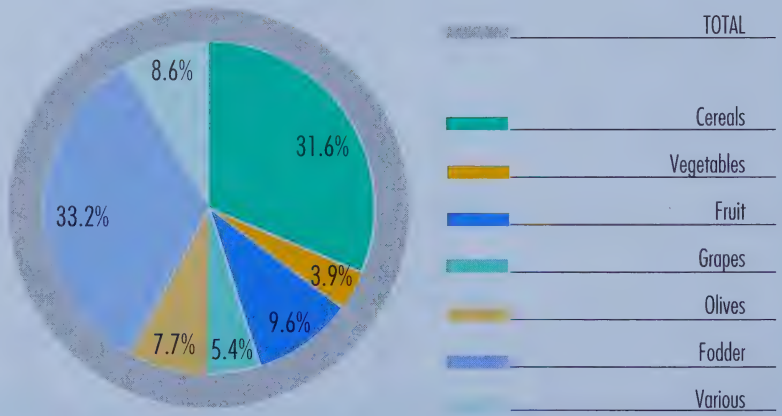
	Area under organic agriculture	Area under conversion	Total
NORTH	18,226	10,288	28,514
CENTRE	22,158	5,495	27,653
SOUTH	22,580	12,899	35,479
TOTAL	62,965	28,681	91,646

Source: data from Ministry for Agricultural, Food and Forestry Resources.
(*) As at 31st December 1993.

under organic production increased from 102,000 to 384,000 hectares. As regards sales and marketing of organic products, it has been calculated that, overall, about 0.5% of agricultural products derive from organic agriculture, though widely varying between member States. This market share is expected to increase to 2.5% by 2000.

In Italy, according to figures for 1993, from the system of control foreseen under the Regulation, the area under organic production amounted to about 63,000 hectares, with a further 28,000 hectares in the process of conversion. The number of operators is just over 4,000 units, of which 3,757 are in the production phase and the remaining number involved in food preserving and processing. It is worth noting that the number of operators requesting to be included

Share of areas under organic agriculture and under conversion by product group (ha)



under the provisions of Regulation 2092 in Italy rose to more than 6,000 in 1994. In 1993, 41% of farms were situated in the North, 20% in the Centre and 39% in the South, with a national average of 16 hectares. As regards total area, including that in the process of reconversion, the highest share is in Sicily (31.6%), followed by Tuscany and Emilia Romagna, with 11.2% and 10.2% respectively.

In 1993 the VFO for organic production was estimated at about 210 billion lire, excluding livestock production, not yet subject to regulation regarding methods of organic production. The sector which contributes most to organic VFO in Italy is that of fruit and vegetables, representing a third of the total.

In second place is the cereals sector (and in particular rice production), then fodder and finally industrial crops, and especially soya. The olive oil and wine sectors still have a negligible share of the value of total organic production, probably due to problems in marketing a processed product indicated as organic.

Organic production in the EU 1994

	Producers (no.)	Area (ha)
Belgium	155	1,800
Denmark	700	14,000
Germany	4,950	160,000
Greece	150	200
Spain	750	10,700
France	3,650	100,000
Ireland	250	3,865
Italy	3,600	60,000
Netherlands	467	10,000
Luxembourg	12	500
Portugal	120	3,000
United Kingdom	700	20,000
TOTAL	15,504	384,065

Source: Ifoam; Ministries of the single member states.

RESEARCH AND DEVELOPMENT

Around 65% of funds for public research and development for the agricultural sector is divided up between the Ministry for Universities and Scientific Research (22%), the Ministry for Agricultural, Food and Forestry Resources, the National Research Council (22%) and the Regions and bodies connected with them (18%). The remaining funds are divided up between other research institutes. The allocation of funds, in accordance with set objectives, allows for about 28% of expenditure for vegetable products, 22% for general research on production and agricultural technology, 7% for animal products and finally 5% for agro-food technology. Agro-environmental research objectives are included under the heading "general research".

The number of personnel employed

Research and experimentation by Regions and associated bodies (1994)

Regions and Autonomous Provinces	Expenditure for research billion lire 1990		Research expenditure as % of VFO in agriculture	1994 Personnel in Research	
	average 91/93	1994		Total	Researchers
Piemonte	2,864	2,206	0.06	42	21
Valle d'Aosta	1,538	1,681	2.87	22	10
Lombardia	0,821	1,133	0.02	27	12
Veneto	8,950	8,104	0.16	110	41
Trentino-Alto Adige	14,282	15,552	1.41	228	66
Friuli-Venezia Giulia	5,812	3,965	0.45	65	12
Emilia-Romagna	14,123	9,844	0.16	93	55
Liguria	1,568	1,274	0.12	24	12
Toscana	1,851	2,482	0.13	46	26
Umbria	0,474	0,539	0.06	37	n.d.
Marche	0,563	1,731	0.13	31	3
Lazio	0,642	0,000	0.00	5	0
Abruzzo	3,518	0,887	0.07	18	n.d.
Molise	0,578	0,000	0.00	1	0
Campania	1,692	1,134	0.04	n.d.	n.d.
Puglia	0,422	0,148	0.00	3	2
Calabria	4,228	0,000	0.00	154	13
Basilicata	1,095	1,511	0.23	125	41
Sicilia	5,779	6,294	0.14	76	12
Sardegna	14,982	25,316	1.66	264	n.d.
TOTAL	86,783	83,799	0.17	1,371	326

Sources: INEA, Schede NABS, NOMISMA.

in public research bodies in the agricultural field amounted to 3,718 units, of which 1,261 were researchers, 1,693 technicians and 764 administrative and other; in addition, there were 1,684 university researchers in the agrarian and veterinary faculties.

Overall, a stagnation in public investment in research is apparent: between 1993 and 1994 in research and agrarian experimental institutes the number of employees remained stationary. Taking into consideration the 23 central offices and the 53 branch offices the average number of employees per unit is 12.6. Furthermore, it should be remembered that institutes of research and experimentation are awaiting restructuring as laid out in law no. 491 of 1993, in favour of the creation of a single body. The Ministry for Agricultural, Food and Forestry Resources provides 77% of finance for the research bodies.

Amongst research activities there are some activities worth noting: the MIRAAF programmes, coupling objectives regarding production with those of advanced research, with funding in 1994 that amounted to 43.6 billion lire; the CNR programmes, amongst which the programme of Advanced Research for Innovation in the Agricultural System (RAISA), which reached its fifth and final year in 1995 (36.9 billion lire); the second national programme on advanced biotechnologies by MURST, stimulated by a general recognition of diminishing attention on the problem of biotechnologies and searching to identify the crucial points for a renewed strategic involvement.

The European Union finances a Framework Programme of Research and Technological Development dedicated to particular areas of research, in which the programmes "Natural resources Management" and "Life Sciences and Technologies" (biotechnologies, agriculture and agro-industry, bio-medicine) are included. Total funding for the implementation for the fourth Framework Programme (1994-1998) amounts to 12,300 million ECU, of which 1,080 million ECU are for the environmental sector, 552 million ECU for biotechnologies and 684 million ECU for agriculture and agro-industry.

Development Services

As regards development services in agriculture, the most important events in 1994 were the approval of the National Plan and the commencement of negotiations between the European Union, the State and Regions concerning the second phase of the Reform of Structural Funds, for the five-year period 1994-1999. The National Plan proposes the introduction of a "system of services" through a precise definition of the areas of responsibility of each component and through the reorganisation and co-ordination of existing bodies. Moreover the modes for obtaining funds are indicated, because of the sharp fall in available funds for the sector. As regards the role of the Regions, the legislation allows a significant degree of autonomy, even if the quality of the norms is not homogenous. The main part of this legislation concerns the employment of extension workers, or laws defining the principles and orientation of intervention whilst paying little attention to the instruments for implementation. Where there is a prevalence of private operators in the information and training sector, the Regions take on a role which concentrates on guidance, co-ordination and control, as well as the promotion of research and experimental activities which are in the collective interest and cannot be patented.

Professional training has been the responsibility of the Regions since 1978. Within this sector, agricultural training represents 14.5% of the total training organised. The number of extension workers has increa-

Training: expenditure by Regions (billion lire)

Years	Value in current lire	Value in constant lire 1990
1990	2,599.9	2,599.9
1991	3,069.1	2,884.5
1992	3,252.4	2,900.1
1993	3,302.0	2,825.7
TOTAL	12,223.4	11,210.3

Source: calculated by INEA from ISFOL data.

sed in recent years and is expected to increase further, especially in the South.

As regards the second phase of the Reform of Structural Funds, the Multi-regional Operative Programme was approved for agricultural development and extension in connection with the Plurifond Operative Programmes (POP), aimed at the promotion of agricultural development, which also provides for a sub-programme regarding services of development and extension. On a national level, a specific plan was proposed to support the services for agricultural development, and it concerns extension workers, technological innovations, training of extension workers, didactic support, technical assistance and the establishment of a multi-regional guaranty fund.

Agricultural extension workers in Regional development services as at 30th June 1995

Regions	Agricultural Dept.	Development body	POs	Other	Total
Piemonte	112	-	11	1	124
Valle d'Aosta	7	-	-	-	7
Liguria	17	-	21	-	38
Lombardia	73	5	23	17	118
Trentino-A.A.	-	-	-	-	-
Veneto	-	3	48	8	59
Friuli-V.G.	-	-	13	-	13
Emilia-Romagna	9	-	33	54	(1) 96
Toscana	9	23	41	-	73
Umbria	20	-	10	-	30
Marche	34	3	4	7	48
Lazio	104	4	-	-	108
Abruzzo	-	46	67	-	113
Molise	-	36	-	-	36
Campania	103	-	91	-	194
Puglia	31	-	-	-	31
Basilicata	45	-	51	-	96
Calabria	-	163	34	-	197
Sicilia	229	-	-	-	229
Sardegna	-	74	-	-	74
GRAND TOTAL	793	357	447	87	1,684

(1) *These data do not include agricultural extension workers who have completed 6 years' employment.*
Source: Regional agricultural depts.

Training of agricultural extension workers (*)

EXTENSION WORKERS TO BE TRAINED

	1st Framework Plan (no.)	2nd Framework Plan (no.)
North	1,028	582
Centre	556	300
South	1,916	1,118
ITALY	3,500	2,000

(*) As at 31st December 1994.

EXTENSION WORKERS TRAINED (1992/94)

INSTITUTIONS AND LEGISLATION

The Framework of Responsibilities

The law of 4th December 1993, no. 491, provided for the reorganisation of national and regional competencies as regards agriculture and forestry and the establishment of the Ministry for Agricultural, Food and Forestry Resources.

Activities concerning agriculture and forestry, acquaculture and agro-tourism, as well as those relating to territorial conservation and development are the competence of the Regional authorities.

In the above-mentioned areas, the Ministry performs the following functions:

- *it takes care of international relations and participates in drawing up Community policies;*
- *it makes the necessary arrangements for implementing Community measures;*
- *it defines national policies, including planning the activities of direction and co-ordination, the collection, processing and diffusion of information and data.*

The Law establishes various specific Permanent Committees for determining objectives and general objectives for agricultural, food and forestry policies, to be advocated at national, Community and international level:

- *the Permanent Committee on agro-food and forestry policies (art.2 comma 6);*
- *the Permanent Committee for veterinary and livestock problems;*
- *the Permanent Committee on services for the industrial processing of agricultural and forestry products (art.4);*
- *the National Council for agro-food research (art.6 comma 2,D).*

The Permanent Committee on agro-food and forestry policies meets monthly.

It is established by law that the quota of financial resources attributed to the Ministry for measures relating to its responsibilities (foreseen by planning laws) cannot exceed 20%.
In addition, provisions are made for reform of the National Forest Guard, the Agricultural Intervention Board, the Central Inspectorate for the repression of Fraud and for the re-organisation of the Agricultural Research Institutes and other research institutes under the supervision of the Ministry.

The Presidential decree no. 197 of 15th March 1994 lays out the Regulation concerned with the norms for organising the offices of the Ministry, and the following Directorates-General have been established:

- *DG for Community and international policies;*
- *DG for national agricultural and agro-food policies;*
- *DG for forestry, mountain and water resources;*
- *DG for fishing and acquaculture;*
- *DG for personnel and general services.*

EU Expansion and Trade Agreements

EU expansion

From 1st January 1995 the European Union gained three new members: Austria, Finland and Sweden. The adhesion of these three countries was ratified by popular referendum; in Norway, in contrast, the outcome of the referendum was negative and so its adhesion to the Union was suspended. The procedure for entry for the new Member States was considerably accelerated by their good economic and social positions and by the consideration that, after an initial transitory phase of adjustment, these countries would make a substantial contribution to the Community budget.

The topics most debated during the period of preparation leading up to the entry of Austria, Finland and Sweden were those of the environment and of structural and agricultural policies. As regards the environmental measures, the new members obtained and maintained standards and norms that were more severe than those currently in force in the Community, while as regards agricultural policies, the high levels of subsidies and protection in the primary sector, owing mainly to adverse geo-climatic conditions, led to an agreement favouring a period of transition and gradual adjustment in order to align agricultural prices and intervention levels with those of the Community. Finally, as regards structural and development policies, only one region of Austria was eligible under Objective 1, whereas for Scandinavian regions a new priority intervention objective was established (Objective 6) linked to the socio-environmental characteristics of those regions; more specifically, the distinguishing parameter is that of low density of population, whereby those regions with less than 8 inhabitants per Km^2 are eligible.

Trade agreements

As regards trade agreements stipulated by the Union within the European Economic Area (EEA), four different fronts can be identified for negotiations: the Baltic region (Estonia, Latvia and Lithuania); Central and Eastern European countries (Hungary, Poland, Bulgaria, Romania, Slovenia, the Czech and Slovak Republics); the Mediterranean basin (ex-Yugoslavia, Cyprus, Malta, Turkey, and countries in the Maghreb and the Mashrak); the ex-Soviet Republics (Russia, Ukraine, other countries of the CIS). Amongst the

first three groups a large number have made a formal request for adhesion to the Union and for many of them agreements are being reached within a more general strategy of pre-adhesion whilst for other countries partnership agreements and bilateral relations exist. In May 1995 a white paper was drawn up and adopted as the guide for the preparation of the six countries already associated (Poland, Hungary, the Czech Republic, the Slovak Republic, Bulgaria and Romania) and of those negotiating trade agreements with the Union (the three Baltic states and Slovenia) to be integrated in the market within the Union.

Since 1st January 1995 free trade agreements have been in force with the three Baltic states, and these were then included in the plans of agreement sealed in April 1995, in which a close long-term association between the parties is affirmed along with the participation of the Baltic countries in the structured dialogue between the Union and the associated countries, within the framework of the pre-adhesion strategy defined in 1994.

On 1st February 1995 agreements between member countries of the Union and Bulgaria, Romania, the Czech Republic and the Slovak Republic came into force, matching those already stipulated with Poland and Hungary the year before. These agreements regulate political, economic and trade relations between the two parties and aim to establish close and long-lasting relations, with the objective of granting full association in the process of European integration to the countries in question.

The situation regarding agreements with countries in the Mediterranean basin is more complex, because of greater economic and socio-cultural differences within the group itself and between those countries and member states. In general, however, the attitude of the European Union towards these countries can be defined as very open. In December 1994 the Council of Europe proposed the introduction of a Euro-Mediterranean partnership with the aims of social and economic stabilisation.

In November 1995 the Euro-Mediterranean Conference of Barcelona produced a series of concrete objectives for partnership between the two areas, principally regarding the creation of an area of free trade, co-operation in the development of an integrated transport system, information technology, the environment and the fight against

crime and terrorism. Furthermore, trade agreements were stipulated with Tunisia, Morocco, Israel, and, more recently, Macedonia.

Trade relations with the ex-Soviet republics are intensifying year by year, and are coupled, as in the other cases, with interventions of aid and assistance.

Bilateral relations are quite advanced with Russia, the Ukraine, Moldavia and Belorussia, whereas for the other states, the highly unstable economic, political and social conditions represent an obstacle to the conclusion of more important and longer-term agreements.

The Common Agricultural Policy

In recent years the Common Agricultural Policy (CAP) has been subject to change in order to adapt to the new circumstances as well as to the evolution of the markets and of technology.
Great efforts have in fact been made to limit surplus production and expenditure and to avoid a decline in farm incomes.
The first measures for reform were taken in 1979. In the face of continuous increases in the surplus of dairy products it was decided to apply a co-responsibility levy; in 1984 quotas for dairy produce were established and in 1988 the mechanism of automatic stabilisers was introduced.
In June 1992 the Council approved the most radical reform package since the introduction of the CAP thirty years earlier.
The main objectives of the reform were:

- *to enable the Community to preserve its position as an important producer and exporter of agricultural products and to become more competitive on both home and export markets;*
- *to reduce output to a level nearer to market demand;*
- *to give priority in the erogation of income aids, to those farmers with the greatest need;*
- *to encourage farmers to remain in the countryside;*
- *to protect the environment and to develop the natural potential of rural areas.*

The new CAP has had effect in the arable sector starting from the 1993/94 season. This sector includes cereals, oilseeds and protein plants and represents more than 10% of marketable production in Italy.
The new policy of support for these crops foresees a gradual reduction in indicative and intervention prices (so as to bring them more into line with world prices), compensated by direct aid to incomes, calculated as per hectare payments on the basis of past yields, differentiated according to a plan of regionalisation of national territory which divides Italy into 254 homogenous areas.
In order to define the aid and the obligations associated with it, producers have been divided into two principal categories, subject to two different regimes: large producers to whom the general regime applies, and small producers, to whom a simplified regime is

applied. The former are producers who request aid for an area which, on the basis of the plan of regionalisation, gives rise to production of more than 92 tons; the latter are producers who, on the basis of the yields in the plan of regionalisation, request aid for an area which renders less than 92 tons.

The difference between the two regimes consists in the fact that in the general one (large producers) compensation is differentiated by crop and there is an obligation to set aside a percentage of the area for which aid is requested, fixed at 12% for 1995 and at 10% for 1996, whilst in the simplified one, (small producers) there is only one level of compensation, independently of the type of crop, (although supplementary aid per hectare for hard wheat remains in the specified areas particularly suitable for it) and there is no obligation to undertake set-aside.

The prices for beef will also be reduced by 15% within three years. This reduction will be compensated by supplementary premia for cattle raised on open pasture so as to encourage extensive farming.

In particular, cereal producers preferred the simplified regime to avoid setting aside a percentage of land. In 1995 666,000 applications for compensatory payment were presented to the Intervention Board; of these, 89% were in con-

Average farm area for applications made

Season	No. of applications	Total area(ha)	National average area (ha)	Simplified regime			General regime		
				No of applications	Area (ha)	Average area (ha)	No of applications	Area (ha)	Average area (ha)
1993	537,000	3,879,000	7.22	483,000	2,641,000	5.4	54,000	1,238,000	22.9
1994	615,000	4,200,000	6.82	553,000	2,726,000	4.9	62,000	1,473.000	23.7
1995	666,000	4,565,000	6.81	592,000	2,854,000	4.8	74,000	1,711,000	23.1

nection with the simplified regime. Oilseed producers, on the other hand, adhered in mass to the new CAP, requesting aid for all the cultivated area, and for the most part they opted for the general regime; moreover, 97% of the area sown to oilseeds has been cultivated under the general regime.
As regards set-aside, altogether, between the simplified regime (optional) and the general regime (obligatory), only 5.5% of the areas for which compensation was requested was actually withdrawn from production.

The change in the market mechanisms for individual products has been flanked by a series of "accompanying measures" which generate both compensatory and structural effects:

Area under general regime and simplified regime (*)

Crop	General regime no. of applications: 74,124 area (ha)	Simplified regime no. of applications: 592.002 area (ha)
Hard wheat	344,470	1,291,453
Corn	392,652	580,166
Other cereals	311,000	937,705
Total cereals	1,048,122	2,809,324
Soya	172,095	5,922
Colza	42,748	1,520
Sunflower	193,168	5,174
Total oilseeds	408,011	12,616
Total protein crops	7,827	33,726
Total non-textile linen	145	75
Rotational set-aside	182,650	
Non-rotational set-aside	65,042	
Total set-aside	247,692	
Total	1,711,927	2,855,741
GRAND TOTAL		4,567,668

(*) As at 1995.
Source: AIMA.

Regulation 2078/92

- *developing environmentally compatible agriculture through reduced use of fertilisers and pesticides and other methods of extensive production.*

Regulation 2079/92

- *encouraging the early retirement of farmers of 55 years and over to make room for young farmers.*

Regulation 2080/92

- *financing re-afforestation schemes and rationally managing lands withdrawn from production.*

Following Reg. 2078/92 all Regions have drawn up regional agro-environmental programmes which have been approved by the European Commission, except for that of Campania.

Applications of the CAP in the reform of the arable sector in EU countries

Countries	Basic area	Five-year set-aside	Obligatory set-aside	Area under cereals, oilseeds and protein crops %	
				Simplified regime	General regime
EU 12	49,030	1,224	6,009	26.56	73.44
Belgium	479	1	26	63.55	36.45
Denmark	2,018	6	266	20.76	79.24
Germany	10,156	221	1,392	21.07	78.93
Greece	1,492	0	24	90.80	9.20
Spain	9,220	68	1,339	25.07	74.93
France	13,526	190	1,933	16.57	83.43
Ireland	346	1	36	31.49	68.51
Italy	5,801	639	249	65.15	34.85
Luxembourg	43	0	2	63.89	36.11
Netherlands	437	14	15	77.57	22.43
Portugal	1,054	0	73	41.67	58.33
United Kingdom	4,461	86	655	6.46	93.54

The overall cost of this programme is estimated at 1,090 million ECU (about 2,057 billion lire), of which 650 million ECU to be provided by the EU (about 1,227 billion lire) and 440 million ECU to be provided by the State (about 830 billion lire).

Application of EEC Regulation 2078/92

Payments erogated (million lire) as at June 1996

	Sum paid 1994	Sum paid 1995		Sum paid 1994	Sum paid 1995
Valle d'Aosta	3,048	4,659	Abruzzo	–	385
Piemonte	–	52,882	Molise	517	711
Lombardia	–	4,999	Campania	(*)	(*)
P.A. Bolzano	10,439	16,264	Puglia	(**)	–
P.A. Trento	6,740	–	Basilicata	–	11,901
Veneto	6,135	18,831	Calabria	(**)	–
Friuli V. G.	474	–	Sicilia	4,616	51,661
Liguria	–	232	Sardegna	941	6,356
Emilia R.	3,610	21,946	Totale Ob. 1	6,074	71,014
Toscana	–	58,864	a carico FEOGA (G)	4,544	53,261
Umbria	3,563	10,007			
Marche	818	2,820			
Lazio	2,909	19,410			
Total excluded under Ob. 1	37,736	210,914	Grand Total	43,811	281,928
Paid by EAGGF (G)	18,868	105,457	EAGGF(G) Total	23,413	158,718

(*) Programme not approved.
(**) Programme started at the end of 1995.

A programme of national aid has been drawn up in connection with Reg. 2079/92, between the Regions and the Ministry for Agricultural, Food and Forestry Resources, and is known as the national programme for early retirement in agriculture. This programme was approved by the European Commission with decision no. C (94) 1280 of 7th September 1994. A ministerial circular was then emanated (no. 1 of 20th April 1995). The total cost of the programme is estimated at 291.9 million ECU (about 555.5 billion lire) of which 176.6 million ECU to be provided by the EU (about 335 billion lire) and 115.3 million ECU by the State (about 220 billion lire).

As regards Regulation 2080/92, regional programmes have been drawn up and approved by the EU.

The total cost is estimated at 494 million ECU (about 930 billion lire), of which 300 million ECU to be provided by the EU and 194 million ECU (about 360 billion lire) by the State.

Application of EEC Regulation 2079/92

Region	Beneficiaries no.	Sum paid (lire)
Veneto	23	233,812,679
Toscana	6	46,181,815
Umbria	2	83,419,550
Marche	2	28,538,000
Basilicata	5	26,392,230
Total	38	418,344,274

Application of EEC Regulation 2080/92 (*)

Region	1994 Season		1995 Season	
	Beneficiaries no.	Sum erogated (mio. £)	Beneficiaries no.	Sum erogated (mio. £)
Piemonte	-	-	154	2,195,0
Lombardia	423	13,982,1	158	5,179,5
Bolzano	-	-	2	1,781,8
Veneto	-	-	49	700,2
Friuli V,G,	10	123,6	-	-
Liguria	13	117,0	-	-
Emilia R,	312	7,158,4	-	-
Toscana	108	2,211,9	372	7,155,2
Umbria	60	1,172,7	206	8,670,0
Marche	-	-	216	3,178,5
Lazio	22	626,9	19	1,045,1
Excluded under Ob, 1	948	25,392,8	1176	29,905,4
Abruzzo	-	-	3	2,545,3
Calabria	-	-	1	114,2
Sicilia	72	2,621,2	119	5,179,6
Sardegna	88	2,564,1	22	117,6
Objective 1	160	5,185,3	145	7,956,7
Total	1,108	30,578,1	1,321	37,862,1

(*) As at 29th February 1996.

Structural Funds for Agriculture

On 20th July 1993, the EEC Council of Ministers promulgated six Regulations on the basis of the reforms to the Common Agricultural Policy set under way by the Community in 1992, which were intended to discipline the structural funds for the period 1994-99.

The structural funds of the Community are the following:

- ***EEC Regulation 2080/93** of the Council, dispositions for applying the EEC Regulation 2052/88 as regards the financial measures for fishing (EFF).*
- ***Framework Regulation 2081/93** which modifies the EEC Regulation 2052/88 concerning the emission of funds for structural purposes, their effectiveness and the co-ordination of their related measures and those of the European Investment Bank and the other existing financial measures.*
- ***EEC Regulation 2083/93** which modifies EEC Regulation 4253/88 relating to provisions for applying EEC Regulation 2052/88 as regards co-ordination between measures from the various structural funds on the one hand and between these measures and those of the European Investment Bank and other existing financial measures on the other.*
- ***EEC Regulation 2083/93** which modifies EEC Regulation 4254/88 relating to the provisions for the application of the EEC Regulation 2052/88 as regards the European Social Fund (ESF).*
- ***EEC Regulation 2084/93** which modifies EEC Regulation 4255/88 relating to the application of EEC Regulation 2052/88 as regards the European Regional Fund (EFRD).*
- ***EEC Regulation 2085/93** which modifies EEC Regulation 4256/88 relating to the application of EEC Regulation 2052/88 as regards the Orientation Section of EAGGF.*

The Community objective is to reinforce its economic and social coherence contributing, at the same time, to the regional re-balancing of the Community.

In the proposals for modifying the Regulations the priority objectives that the Community intends to finance with the structural funds

available have been indicated, and the criteria it will follow for the erogation of such funds which have been put at the disposal of the member states for a period of six years.
The combination of different structural funds is admitted; the EIB contributes with loans for achieving the five objectives.
The funds can co-finance operative programmes, global subsidies as well as be used in conjunction with national aid compatible with EEC policy and can be utilised for granting loans for extension and preparatory studies. The Ministry for Agricultural, Food and Forestry Resources, together with interested Regions, has taken steps to integrate Community indications into national provisions as regards those aspects which affect agriculture.

The main structural Regulations of the EEC

AGRICULTURE

2328/91	(*) (1) improving the efficiency of agrarian structures
2088/85	integrated Mediterranean programmes.
2081/93	the emission of structural funds, their effectiveness, coordination with EIB and other financing agents.
866/90	improvement of conditions for marketing and processing agricultural products
867/90	improvement of conditions for marketing and processing forestry products
1401/86	action for improving agriculture in some less-favoured areas of northern Italy
768/89	transitional aid to agriculture
1360/78	producers' associations and their unions
1035/72	producers' organisations in the horticultural sector

STRUCTURAL MEASURES FOR LIMITING PRODUCTION

1422/88	premia for eliminating vineyards
822/87-2741/89	national aid for planting vineyards
1200/90	improving Community production of apples
2066/92	premia for raising cattle for beef and for dairy production
336/86	compensation for abandoning milk production
3493/90	premia for raising sheep and goats

FISHING AND AQUACULTURE

2080/93	funding for fisheries

PROGRAMMES OF COMMUNITY INITIATIVE

Leader II	coordination between initiatives for rural development in support
Fishing	of restructuring in the fishing sector

(*) codifying Reg. 797/85 and successive changes.
(1) modified by 2843/94.

Structural funds - availability of finance, 1994-99

	Total investment (milion ECU)						
	Public expenditure			Private	Total investment	Total Investment (b) (million lire)	% (c)
	EU	State	Total				
	1	2	3 = (1+2)	4	5 = (3+4)		
Objective 1	2,228.0	1,130.6	3,358.6	907.6	4,266.2	8,009,142	37.7
Objective 5B	410.8	499.0	909.8	799.3	1,709.1	3,208,611	16.6
Objective 5A (a)	680.0	1,192.2	1,872.2	922.1	2,794.3	5,273,802	39.8
Leader II (*)	285.9	176.4	462.3	243.3	705.6	1,409,307	5.9
Grand total	3,604.7	2,998.2	6,602.9	2,872.3	9,475.2	17,900,862	100.00

(a) Regions excluded from Ob. 1.
(b) Total investment (Col. 5) expressed in million lire with exchange rate 1 ECU = 1,887.35 lire.
(c) Percent of national quota.

(*) Exchange rate used: 1 ECU = 1,997.45 lire.

Structural Policy in the Community: objectives and measures

Objectives	Funds to be utilised
Objective 1	EFRD ESF EAGGF/Orientation
To promote the development and adjustment of regions with retarded development	
Objective 2	EFRD ESF
To reconvert regions or parts of them particularly hit by industrial decline	
Objective 3	ESF
To combat long-term unemployment, to facilitate the employment of young people and the integration into the labour market of persons threatened by social emargination	
Objective 4	ESF
To facilitate the adjustment of workers to industrial change and the evolution of systems of production	
Objective 5	a-EAGGF/Orientation, EFF b-EAGGF/Orientation, ESF, EFRD
To promote rural development a - to accelerate structural adjustment in the framework of the reform of the CAP b - easing the structural adjustment of rural areas	

Community structural funds

Objective 1 *- is the section of structural funds (EU financing for regional development) allocated to areas with retarded development. Areas entitled to receive such aid in Italy for the period 1994-99 are: Abruzzo (until 1996), Basilicata, Campania, Molise, Puglia, Calabria, Sicily and Sardinia. The Regions in question must draw up Multi-fund Operative Programmes which provide for activity designed for diversification, enhancement of agricultural resources and rural development. The MOP drawn up by the Regions were all approved by the EU and during 1995 the first supervisory committees met, made up of representatives from the Commission, the state and the Region.*

Objective 5b *- is the section of Community funds designated to the areas of the Centre-North of Italy through programmes of rural development. During 1994 the Commission of the EU approved the "Single Planning Documents 1994/99" of the 13 Regions involved in Objective 5b.*

Objective 5a is the section of structural funds designated specifically to innovative investment in the rural environment. They are divided into two sections, those destined to development plans for farms (Reg. 2328/91) and the rest destined to agro-industry (Reg. 866/90). The first section has, however, gained precedence, with 72.7% of the funds assigned. In fact, 680 million ECU are available to Italy for agriculture and 118.6 million ECU for fishing; they are managed principally at Regional level. In the Regions eligible under objective 1 these Regulations are included in the Multi-fund Operative Programmes.

Particular importance is attached to the Multi-regional Operative Programmes foreseen within the Community framework of support and which involve mainly the Southern regions where the need for further support and for combined action between State and Regions as regards services for agricultural development is the most felt.

Two operative programmes have been drawn up:

- *Services for the development of agriculture and for extension;(1)*
- *Rationalisation of trading channels for agricultural produce from the South.(2)*

(1) Approved at the end of 1995 with financial funding of 231.429 million ECU (about 463 billion lire) all of which provided by public quota.

(2) Under approval. The financial funding ought to be about 120 million ECU (about 240 billion lire) of which 30 million ECU (60 billion lire) is provided by private funding.

Leader II Regional programmes approved

Region	EU Decision
OBJECTIVE 5B	
Valle d'Aosta	27.12.1995
Piemonte	*
Lombardia	*
Veneto	
Prov. Trento	*
Prov. Bolzano	22.11.1995
Friuli V.G.	27.12.1995
Liguria	*
Emilia Romagna	27.12.1995
Marche	*
Toscana	1.12.1995
Umbria	1.12.1995
Lazio	
OBJECTIVE 1	
Abruzzo	5.6.1995
Molise	*
Campania	5.4.1995
Puglia	14.9.1995
Basilicata	5.4.1995
Calabria	28.11.1995
Sicilia	
Sardegna	14.9.1995

(*) Awaiting official communication of the decision from the Commission.

Finally, the Community initiative LEADER II 1993/99 must be mentioned; it is a specific action for rural development which affects all regions of Italy. Regional programmes are used as the instrument for programming integrated development projects (agriculture, tourism, environment, crafts, services, etc.) which are carried out either by public or private agents denominated Local Action Groups.

In 1995 12 regional programmes were approved, while the others are at an advanced stage in negotiations. For the implementation of these programmes a Community co-financing is foreseen of 100.36 million ECU for the regions eligible under objective 5b and 285.87 million ECU for those eligible under objective 1.

The Regions are currently selecting projects.

Leader II: division of Community resources between Regions (*)

Region	Million ECU
OBJECTIVE 5B	
Bolzano	4.80
Emilia R.	6.35
Friuli V.G.	4.90
Lazio	16.23
Liguria	3.92
Lombardia	4.49
Marche	8.37
Piemonte	9.17
Toscana	14.81
Trento	2.22
Umbria	8.41
Valle d'Aosta	0.47
Veneto	16.22
Total	100.36

Region	Million ECU
OBJECTIVE 1	
Abruzzo	15.97
Molise	9.77
Campania	25.82
Puglia	26.60
Basilicata	19.55
Calabria	23.15
Sicilia	32.28
Sardegna	32.37
Total	185.51
GRAND TOTAL	285.87

(*) As at 15th February 1995.

National financial intervention

In 1995 financial intervention in the agricultural sector was implemented in accordance with Law no. 46 of 24th February 1995, which converted the decree no. 727 of 23rd December 1994, with modifications, regarding the norms for the beginning of programmed interventions in agriculture and the control of dairy production to reflect Community quotas.
The table shows the finance erogated under Law no. 752/86 (pluriannual law for expenditure in programmed intervention in the agricultural sector) and that erogated with the bi-annual deferment under the law of 10th July 1991.
It can be observed from the table that in less than ten years public intervention in the agricultural sector has fallen considerably, because of continued cuts in public expenditure every year.
On 10th May 1995 the CIPE (Interministerial Committee for Economic Planning) divided the allocated finance of 800 billion lire between the Regions, the Autonomous Provinces and the State.
The allocation was effectuated following the procedures laid down by the Law 491/93 which attributes to the central administration not more than 20% of available resources; the Ministry received 160 billion lire , for implementing actions within its sphere of responsibility, and the remaining 640 billion lire went to the Regions and the Autonomous Provinces for carrying out interventions in the agricultural and forestry sectors, and shared

Finance erogated under Law no. 752/86 (*)

CIPE deliberation (billion lire)	
17 December 1986	2,765
23 April 1987	2,993
14 June 1988	3,250
2 May 1989	3,292
15 May 1990	3,029
2 August 1991	3,052
31 January 1992	1,000
13 July 1993	1,781
2 June 1994	1,028
10 May 1995	0,800

(*) Law 752 of 8th November 1986 "The law on expenditure over several years for measures programmed for the agricultural sector"

out as shown in the table.

Funds assigned to Regions for 1995 under Law 46/1995

Region	Parameter	Sum(m.lire)
Piemonte	6.079	38,906
Liguria	1.999	12,794
Lombardia	6.546	41,894
Veneto	6.486	41,510
Emilia Romagna	8.124	51,994
Toscana	6.128	39,219
Umbria	2.798	17,907
Marche	3.591	22,982
Lazio	7.285	46,624
Abruzzo	5.908	37,811
Molise	3.593	22,995
Campania	12.608	80,691
Puglia	13.175	84,320
Basilicata	6.654	42,586
Calabria	9.026	57,767
Total	100.000	640,000

As regards legislation, two important measures must be recorded:

- *DPR of 8th August 1994, n. 376, which disciplines the reproduction of seed potatoes;*
- *DPR n. 348 which disciplines procedures for designated origin in the wine sector.*

Law 183/87

This law guarantees finance for Community Regulations through a rotating fund at the Ministry for the Treasury. On 13th April 1994 a general programme of financial intervention was deliberated to be carried out with the help of the EU; with the resolution of 20th December objective 5b was also specifically defined , and came into force for 1995 (accelerating the adjustment of agrarian structures) relative to the EU Regulation 2052/88 and the subsequent Regulation 2081/93.

Law no. 88/88

This law concerns inter-professional agreements and contracts for the cultivation and sale of agricultural products for processing or for marketing unprocessed. The law attempts to regulate supply so as to bring it into line with demand in foreign and domestic markets, to improve the quality of production, to establish criteria and general conditions for production and sale of products and for supplying services, and to fix product prices in advance or criteria for the determination of prices. The Ministry may intervene in establishing agreements, in particular as regards the product concerned, the method and timing of delivery, the minimum price, the method and timing of payment, quantity and quality requirements, the period for stipulating contracts.

Law no. 185/92

On 14th February Law 185 was passed concerning the "New discipline for the Fund for National Support" which had been established under the Law 364/70. This fund supplies sums necessary for dealing with damage caused by natural disasters or exceptionally bad weather to infrastructure, farm structures or agricultural production in the areas affected, excepting livestock production.
The measures foreseen are: for emergency aid (erogation of a single contribution which will partially cover the damage); contributions on capital account; loans at subsidised rates of interest for reconstituting working capital; short-term loans, etc.
The finance allocated to the fund for 1995 amounts to 725 billion lire, of which 350 billion lire is ordinary finance, and 375 billion lire a one-off sum for the interventions in the flooded areas in the Centre-North (December 1994).
In addition there is a further 175 billion lire of funding for contributions concerning subsidised agricultural insurance.

APPENDIX

Intermediate agricultural inputs
Expenditure on intermediate agricultural inputs is that for seed, fertilisers, pesticides, feed compounds and other expenditure for livestock, energy, irrigation water and various services.

Agricultural contracting
Is the supply of labour to third parties by appropriately qualified firms, with or without the use of agricultural machinery.

Production subsidies
Premiums and payments erogated by public bodies in favour of the agricultural sector.

Fixed costs
Costs incurred for employing factors of production with lives of several years: amortisation, interest, land rents, expenses connected with labour employed on a permanent basis.

Variable costs
Costs incurred for the employment of single use factors of production: seeds, fertilisers, pesticides, energy, hiring charges, casual labour.

Types of enterprise
- *owner-operator*
- *farms with hired labour and/or share-croppers*
- *share-tenancy*

TF
Types of farming
The classification of farms by type of farming is based on determination of the economic performance of the various productive activities carried out on the farm and the combination of these activities.
For this purpose, the numbers of hectares cultivated or livestock raised are multiplied by the SGM of the zone in which the farm is located. The resulting combination is compared with a typology classification scheme which is used to define the TF on the basis of criteria defined at Community level and is valid for official statistics.
A farm is classified as specialised when the SGM of one activity or of several similar activities exceeds 2/3 of total SGM on the holding.

GDP
Gross Domestic Product
Is the outcome of productive activities carried out on national territory; it is equivalent to the overall value of goods and services produced within a determined territory within a specified period of time, which is usually a calendar year.
It does not include the value of

intermediate output.

VFO
The value of final output
Is the value of production that can be sold and therefore, in agriculture, it is equal to the harvested crop minus the share reused on the holding as a means of production.

SGM
Standard Gross Margin
This is the parameter determined for each productive activity by the difference between the value of final output and the sum of certain specific costs (seed, fertiliser, pesticides, feedstuffs, forage etc.), excluding those for labour and machinery.
Gross margins calculated in this way are defined as "standard" in that the value of final product and costs are calculated on a three-year average, with reference to the altimetric zone of each region. The SGM are expressed in European Currency Units (ECU) and up-dated by INEA when surveys of farm structures or the agricultural census of ISTAT take place. The sum of SGM from all the productive activities on the farm corresponds with its economic dimension and is expressed in ESU (European Size Units).

Net Income
Is the reward to all factors of production belonging to the farm entrepreneur: land, labour and capital.

Normalised Balance
Is calculated from the percentage relation between the simple balance (exports - imports) and the volume of trade (exports + imports); it varies between -100 (absence of exports) and +100 (absence of imports) and permits the comparison of trade performance of groups of different products and of different absolute value.

UAA
Utilised Agricultural Area
Is made up of all agricultural land, permanent meadows and pasture, agricultural tree crops, household gardens and groves for (edible) chestnuts.

Total farm area
In the surveys on farm structure this means the total of UAA, cultivated woodland (woods and poplar groves), unutilised agricultural areas and other areas within the perimeter of the farm.
It differs, thus, from the definition used in annually published agricultural statistics in that in the latter case is included land abandoned and not forming part of a holding.

Access to UAA

The relationship between enterprise and farm capital. It can be:

- *ownership*
- *rent.*

ESU

European Size Unit

For 1987 each Unit is equal to 1,200 ECU or 1,671,000 lire (1 ECU = 1,393 lire). Thus a holding with a total SGM of 7,850 ECU has an economic size of 6.54 ESU.

WU

Work unit

According to the EEC definition for the structural surveys a Work Unit is equivalent to the work of one person who is engaged for at least 2,200 hours in the course of a year.

VA

Value added

Is the sum of the difference between the value of production of goods and services used up in the period specified. It coincides with the sum of remuneration of factors of production and of depreciation in each sector.

Value added at factor cost, as distinct from that at market prices, includes any subsidies erogated by the public administration to the different productive sectors.

In contrast, in calculating value added at market prices, indirect taxes are included and production subsidies excluded.

Useful Addresses

Ministry for agricultural, food and forest resources - MIRAAF
Via XX Settembre,20 - Roma

REGIONAL DEPARTMENTS OF AGRICULTURE
Abruzzo
II Dipartimento
Via Catullo,17 - Pescara
Basilicata
Via Anzio, 44- Potenza
Calabria
Via S.Nicola, 5 - Catanzaro
Campania
Via Oberdan, 32 - Napoli
Emilia Romagna
Via Aldo Moro, 38 - Bologna
Friuli-Venezia Giulia
Via Caccia, 17 - Udine
Lazio
Via Rosa Raimondi Garibaldi, 7 - Roma
Liguria
Via Fieschi, 15 - Genova
Lombardia
Piazza II Novembre, 5 - Roma
Marche
Corso Mazzini, 148 - Ancona
Molise
Via Sauro, 1 - Campobasso
Piemonte
Corso Stati Uniti, 21 - Torino
Puglia
Lungomare N. Sauro, 1 - Bari
Sardegna
Via Pessagno, s.n.. - Cagliari
Sicilia
Viale Regione Siciliana, ang. Via Leonardo da Vinci - Palermo
Toscana
Via di Novoli, 26 - Firenze
Provincia Autonoma di Trento
Località Melta, 112 - Trento
Provincia Autonoma di Bolzano
Via Brennero, 6 - Bolzano
Umbria
Via M. Angeloni - Perugia
Valle d'Aosta
Quart - loc. Amerique, 127/a - Aosta
Veneto
Via Torino, 110 - Mestre

NATIONAL RESEARCH BODIES FOR AGRICULTURE
CNR
Centro Nazionale delle Ricerche
Roma - Piazzale Aldo Moro, 1
ENEA
Ente per le nuove tecnologie, l'energia e l'ambiente
Roma - Via Regina Margherita, 125
INEA
Istituto Nazionale di Economia Agraria
Roma - Via Barberini, 36
ISTAT
Istituto Nazionale di Statistica
Roma - Via Cesare Balbo, 16
ISMEA
Istituto per studi ricerche e informazioni sul mercato agricolo
Roma - Via Nomentana, 183

INN
Istituto Nazionale della Nutrizione
Roma - Via Ardeatina, 546
INFS
Istituto Nazionale per la Fauna Selvatica
Ozzano Emilia - Bologna
Via Cà Fornacetta, 9
NOMISMA - Bologna
Strada Maggiore, 44
UCEA
Ufficio Centrale di Ecologia Agraria e Difesa delle Piante Coltivate dalle Avversità Meteoriche
Roma - Via del Caravita, 7/a

AGRICULTURAL RESEARCH INSTITUTES

Ist. Sper. Agronomico
Bari - Via Celso Ulpiani, 5
Ist. Sper. per l' Agrumicoltura
Acireale (CT) - Corso Savoia, 190
Ist. Sper. per l'Assestamento Forestale e l'Apicoltura
Trento - (Villazzano) - Piazza Nicolini, 6
Ist. Sper. per la Cerealicoltura
Roma - Via Cassia, 176
Ist. Sper. per le Colture Foraggere
Lodi (MI) - Viale Piacenza, 29
Ist. Sper. per le Colture Industriali
Bologna - Via di Corticella, 133
Ist. Sper. per la Elaiotecnica
Pescara - Via Cesare Battisti, 198
Ist. Sper. per l'Enologia
Asti - Via Pietro Micca, 35
Ist. Sper. per la Floricoltura
Sanremo (IM) - Corso degli Inglesi, 508
Ist. Sper. per la Frutticoltura
Roma (Ciampino) - Via Fioranello, 52
Ist. Sper. Lattiero Caseario
Lodi (MI) - Via A. Lombardo, 11
Ist. Sper. per la Meccanizzazione Agricola
Monterotondo (Roma) - Via della Pascolare, 16 (Via Salaria, km. 29,200)
Ist. Sper. per la Nutrizione delle Piante
Roma - Via della Navicella, 2
Ist. Sper. per l'Olivicoltura
Cosenza - Via Silvio Pellico, 53
Ist. Sper. per l'Orticoltura
Pontecagnano (SA) - Via dei Cavalleggeri, 25
Istituto Sper. per la Patologia Vegetale
Roma - Via Carlo G. Bertero, 22
Ist. Sper. per la Selvicoltura
Arezzo - Viale Santa Margherita, 80
Ist. Sper. per lo Studio e la Difesa del Suolo
Firenze - Piazza M. D'Azelio, 30
Ist. Sper. per il Tabacco
Scafati (SA) - Via P. Vitiello, 66
Ist. Sper. per la Valorizzazione Tecnologica dei Prodotti agricoli
Milano - G. Venezian, 26
Ist. Sper. per la Viticoltura
Conegliano (TV) - Via 28 Aprile, 26
Ist. Sper. per la zoologia Agraria
Firenze - Via Lanciola, 12a

Ist. Sper. per la Zootecnia
Roma - Via O. Panvinio, 11

TRAINING AND EXTENSION CENTRES
CIFDA Italia Centrale
c/o Centro Mancini S. Eraclio di Foligno, (PG) - Via Capua, 18
CIFDA
Abruzzo-Campania-Molise
Località Borgo Cioffi - Eboli (Salerno)
CIFDA Metapontum
Basilicata-Calabria-Puglia
S.S. 106 Jonica, km 448,200 Metaponto di Bernalda (Matera)
CIFDA Sicilia-Sardegna
Sede per la Sardegna
c/o Assessorato Agricoltura
Regione Sardegna
Via Emanuele Pessagno (CA)
Sede per la Sicilia
Hotel Azzolini Palm Beach Terrasini - Palermo

FORMEZ
Via dei Campi Flegrei, 34 Arco Felice Pozzuoli - (NA)
CENASAC
Roma - Corso Vittorio Emanuele, 101
CIPA/AT
Roma - Via Fortuny , 20
INIPA
Roma - Via XXIV Maggio, 43

OTHER BODIES
AIMA
Azienda di Stato per gli Interventi nel mercato Agricolo
Roma - Via Palestro, 81
Cassa per la Formazione della Proprietà Contadina
Roma - Via Nizza, 128
Consorzio Nazionale per il Credito Agrario di Miglioramento
Roma - Viale Castro Pretorio, 118
Ente Nazionale Cellulosa e Carta
Roma - Viale Regina Margherita, 262/e

Ente Naz. Previdenza e Assistenza per gli Impiegati dell'Agricoltura
Roma - Viale Beethoven, 48
Ente Nazionale Risi
Milano - Piazza Pio XI
Ente Nazionale delle Sementi Elette
Milano - Via F. Wittgens, 4
FATA
Fondo Assicurativo Agricoltori
Roma - Via Urbana, 169
FAO
Food and Agriculture Organization of the United Nations
Roma - Viale delle Terme di Caracalla
ICE
Istituto Commercio Estero
Roma - Via Litz, 21
INEMO
Istituto Nazionale Economia Montana
Roma - Piazza della Rovere, 104

SCAU
Servizio Contributi Agricoli Unificati
Roma - Via Barberini, 67
Società Agricola Forestale per le Piante da Cellulosa e Carte
Roma - Via dei Crociferi, 19
INSOR
Istituto Nazionale Sociologia Rurale
Roma - Via Boncompagni, 16

FARMERS' ORGANISATIONS, TRADE UNIONS AND PRODUCERS' ASSOCIATIONS

Ordine dei Dottori Agronomi e Forestali
Roma - Via Livenza, 6
Collegio dei Periti Agrari
Roma - Via Angelo Poliziano, 8
Confederazione Generale dell'Agricoltura
Roma - Corso Vittorio Emanuele, 101
Confederazione Nazionale Coltivatori Diretti
Roma - Via XXIV Maggio, 43
CIA
Confederazione Italiana Agricoltori (ex Confcoltivatori)
Roma - Via Fortuny, 20
FLAI CGIL
Federazione Lavoratori Agroindustria
Roma - Via L. Serra, 31
CISL
Unione Generale Coltivatori
Roma - Via Tevere, 20
COPAGRI
Confederazione Produttori Agricoli
Roma - Via Tevere, 15
Federpastori
Roma - Via XXIV Maggio, 43
FISBA-CISL
Federazione Italiana Salariati Braccianti e Maestranze Specializzate Agricole e Forestali
Roma - Via Tevere, 20
UILA
Unione Italiana Lavoratori Agroalimentari
Roma - Via Savoia, 80
UIME
Unione Italiana Mezzadri e Coltivatori
Roma - Via XX Settembre, 118
ANCA -LEGA
Associazione Nazionale delle Cooperative Agricole
Roma - Via Guattani, 13
CONFCOOPERATIVE
Confederazione Cooperative Italiane
Roma - Borgo Santo Spirito, 78
Associazione Generale delle Cooperative Italiane
Roma - Viale Somalia, 164
UNCI
Unione Nazionale Cooperative Italiane
Roma - Via S. Sotero, 32
Union Camere
Roma - Piazza Sallustio,21

AIA
Associazione Italiana Allevatori
Roma - Via Tomassetti, 9
ANAS
Associazione Nazionale Allevatori Suini
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Associazione Granaria Meridionale
Napoli - Circonvallazione Meridionale
Associazione Industriali Mugnai e Pastai d'Italia
Roma - Via dei Crociferi, 44
Associazione Nazionale Bieticoltori
Bologna - Via D'Azeglio,48
Associazione Nazionale Bonifiche Irrigazioni Miglioramenti Fondiari
Roma - Via di S. Teresa, 23
Associazione Nazionale Cerealisti
Roma - Via Po, 102
Associazione Nazionale Esportatori Importatori Ortofrutticoli e Agrumari
Roma - Via Sabotino, 46

ASSOLATTE
Associazione italiana lattiero casearia
Milano - Corso di Porta Romana, 2
ASSOLZOO
Associazione Nazionale Produttori Alimenti Zootecnici
Roma - Via Lovanio, 6
PADANGRANO
Consorzio Formaggio Grana Padano
Milano - Via Tommaso da Cazzaniga, 9/4
Consorzio Formaggio Parmigiano Reggiano
(RE) - Piazza della Vittoria, 4
Consorzio Nazionale Bieticoltori
Bologna - Via Massimo d'Azeglio, 48
CNO
Consorzio Nazionale degli Olivicoltori
Roma - Via Alessandria, 199
FEDERALIMENTARI
Fed. italiana dell'industria alimentare
Roma - Viale dell'Astronomia, 30

FEDEROLIO
Roma - Via delle Conce, 20
FEDERVINI
Roma - Via Mentana, 27/b
UNASCO
Unione Nazionale Associazione Coltivatori Olivicoli
Roma - Via Tevere, 20
UNACE
Unione Nazionale Associazione Cerealicoltori e Semi Oleaginosi
Roma - Via Isonzo, 20
UNACOA
Unione Nazionale Associazioni Coltivatori Ortofrutticoli e Agrumari
Roma - Via Tevere, 20
UIAPROF
Unione Nazionale Associazioni Produttori Frumento
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UIAPOA
Unione Italiana Associazioni Produttori Ortofrutticoli e Agrumari
Roma Via Alessandria, 199

UNAPRO
Unione Nazionale Associazioni Produttori Ortofrutticoli
Roma - Salita Poggio Laurentina, 7
UNAPOA
Unione Nazionale Associazioni tra Produttori Ortofrutticoli e Agrumarie della Frutta Secca
Roma - Viale delle Milizie, 16
UNATA
Unione Nazionale Associazioni Produttori di Tabacco
Roma - Via XXIV Maggio, 43
UNAFLOR
Unione Naz. Produttori Florovivaisti
Roma - Via XXIV Maggio, 43
UNARISO
Unione Nazionale Associazioni Produttori Riso
Roma - Via XXIV Maggio, 43
UNAPA
Unione Nazionale Associazioni Produttori Patate
Roma - Via XXIV Maggio, 43

UNAVINI
Unione Nazionale Associazioni Produttori Vitivinicoli
Roma - XXIV Maggio, 43
UTI
Unione Tabachicoltori Italiani
Roma - Via Curtatone, 3
UNAPROL
Unione Nazionale Associazioni Produttori Olive
Roma - Via Rocca di Papa, 12
UNAPOL
Unione Nazionale Associazioni Produttori Olivicoli
Roma - Via A. Bargoni, 78
AIPO
Associazione Italiana Produttori Olivicoli
Roma -Via Alberico II, 35
UNAZOO
Unione Nazionale Associazioni Zootecniche
Roma - Via Isonzo, 20

UIAPROC
Unione Italiana Associazioni Produttori Ovicaprini
Roma - Via degli Scialoia, 6
UNA
Unione Nazionale Avicoltura
Roma - Via Pasubio, 4
UNAPOC
Unione Nazionale Associazioni Produttori Ovicaprini
Roma - Via Ostiense, 131/L
UNALAT
Unione Nazionale fra le Associazioni dei Produttori di Latte Bovino
Roma - Via Modena, 5
UNICAB
Unione Italiana Associazioni Produttori Carni Bovine
Roma - Via Leone IV, 38
UNICEB
Unione Nazionale Importatori Carni e Bestiame
Roma - Viale Campioni, 13

UNACOMA
Unione Nazionale Costruttori Macchinari Agricoli
Roma - Via Spallanzani, 22/a
UNIMA
Unione Nazionale Imprese di Meccanizzazione Agricola
Roma - Via Savoia, 82

AGRICULTURAL ACADEMIES
Accademia Nazionale di Agricoltura
Bologna - Via Castiglione, 11
Accademia Economico-Agraria dei Georgofili
Firenze, Logge degli Uffizi
Accademia di Agricoltura Scienze e Lettere
VE - Palazzo Erbisti, Via Leoncino, 6
Accademia di Agricoltura
Torino - Via Doria, 10
Accademia di Agricoltura
Pesaro - Via Giordani, 28

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